

SmartOpportunities
User Guide

SmartOffice®



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Introduction

The SmartOpportunities module provides the user with a powerful and flexible way to automatically identify and follow-up with sales opportunities.

Key Features:

- SmartOpportunities' activity outcome is now integrated for a seamless, powerful user experience by eliminating the need to navigate to different areas of the application. The Activity Outcome dialog box introduces all of the necessary information needed to meet the daily needs of end users.
- SmartOpportunities links to the Policy and Pending Case modules for a complete user experience in the sales cycle.
- Managers can define the opportunity type to handle different sales methods (e.g., Retail vs. Corporate).
- The opportunity stages are customizable to handle different sales cycle stages.
- Specific opportunity actions defined for a stage (e.g., Send a Letter, Create an Activity, and Send Invitation to a Seminar).
- The user can customize the opportunity stage to a specific activity outcome.
- Multiple owners can be assigned to one opportunity.
- When creating a new opportunity record from any of the Contact, Marketing, or Opportunity with Marketing Campaign (handling options) modules, the handling options are automatically processed when the record is saved.
- Users can quickly change strategies to determine the best course of action.
- List all competitors with their strengths and weaknesses.
- Users can quickly identify high revenue prospects with the Sales Pipeline report.
- Users can analyze the amount of sales made per Campaign with the Campaign Opportunity Report Summary.
- Managers can review activities and plan the best course of action to secure sales.
- Users can target any market by classifying them in specific groups (e.g., Prospects).
- The SmartOpportunities module interacts with and enhances the function of other base system components and optional modules, such as Activities, Contacts, Households, Marketing/Marketing Campaigns, Surveys, and the SmartOffice One Card System.
- The user-friendly interface enables easy navigation and comprehension.
- Users can review opportunity-specific activities and letters to quickly determine the next course of action.
- Managers can review all opportunities from an Opportunity Summary spreadsheet to improve decision-making and help identify best practices.
- SmartOpportunities maintains a list of Contacts that can assist the user with sales as well as needed resources to complete the sale.
- Users can generate a variety of reports using Dynamic Reports and Microsoft® Excel®.
- The SmartOpportunities module enables users to save time by streamlining processes and promoting efficient organization, leading to cost savings (direct and indirect) while improving customer satisfaction.

Initial Setup

Before adding an Opportunity, the following parameters must be configured:

1. Create an Opportunity Type.
2. Create an Opportunity Stage.
3. Create a Stage Action Definition (if applicable).
4. Create an Opportunity User Role (if applicable).
5. Create a User Role Map (if applicable).
6. Map an Opportunity Stage to a specific activity outcome (if applicable).
7. Identify all Responsible Users (if applicable).
8. Create and Identify Sets and Filters (if applicable).
9. Create Form Letters (if applicable).
10. Create Marketing Campaigns (if applicable).

Opportunity Tracking Setup

The Opportunity Tracking Setup enables the user to add, delete, and modify the Opportunity Type, Opportunity Stages (Sales Cycle), Stage Action Definition, Opportunity Stage Map, Opportunity User Role, and User Role Map.

Before a user starts adding an opportunity, the Opportunity Type and Opportunity Stage must be defined. The Opportunity Type is a description of the opportunity (e.g., Retail and Corporate opportunities). After naming the Opportunity type appropriately, add the Opportunity Stages. Each stage represents a sales cycle step. After the stages have been defined, the user has the option to add an Opportunity User Role and User Role Map. Opportunity User Role and User Role Maps are optional but useful since they automate activity creation and the assignment of activity processes. After the Opportunity User Role and User Role Maps have been defined, the user has the option to add action types for each stage. Stage Actions are optional and are used to set guidelines for what needs to take place in each stage (e.g., Send a Letter, Create an Activity, Send Invitation to a Seminar). When a stage is created, the user can also associate the stage with an activity outcome.

3. Enter the Opportunity Type Name (e.g., Corporate - 1) and then click the **Add** button in the Opportunity Stage section to open the Opportunity Stage dialog box.

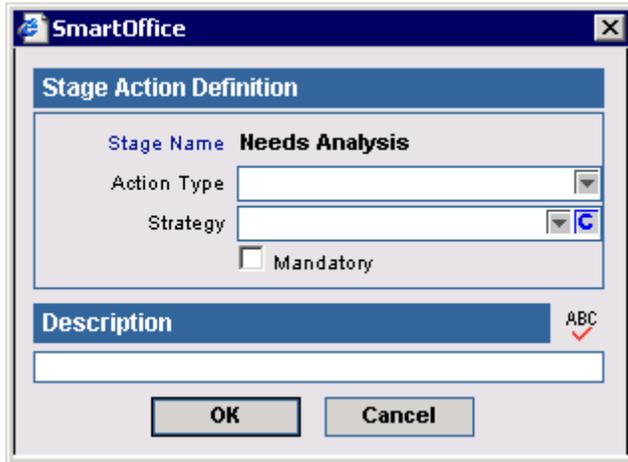
Note: If stages are not defined, a dialog box with the following message opens, “No stages were created for this Opportunity type. Mark it Inactive?” Click the **Yes** button to change the Opportunity Type to Inactive. Click the **No** button to open the Opportunity Stage dialog box in order to add a stage.

The screenshot shows the 'Opportunity Stage' dialog box in SmartOffice. The 'Opportunity Type' is set to 'Corporate - 1'. The 'Stage Name' is 'Need Analysis', 'Default Status' is 'In the funnel', 'Order' is '2', and 'Stage Probability (%)' is '25'. The 'Stage Action Definition' section is empty. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

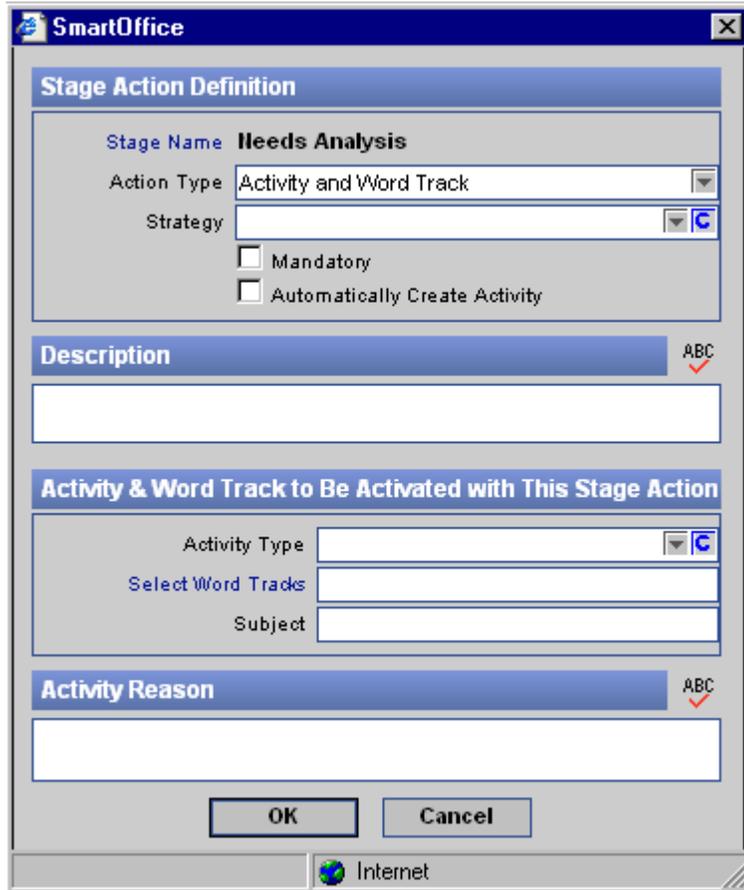
Opportunity Stage Field Descriptions

- **Opportunity Type** - The Opportunity Type name is automatically entered.
- **Stage Name** - Enter the name of the stage (e.g., Warm Prospect, Needs Analysis, Proposal, etc.). This is a mandatory field.
- **Default Status** - Select the Default Status from the drop-down list.
 - Initial
 - Above the Funnel
 - In the Funnel
 - Inactive
 - Sale Made
 - Sale Lost
- **Order** - Enter the sales cycle order for the stage. This is a mandatory field.

- Stage Probability (%)** - Enter the probability of the sale being made. If the user leaves the Stage Probability field blank or the previous default value is not changed on the Opportunity Detail tab, the new stage probability will populate after the opportunity record is saved.
 - In the Stage Action Definition section, click the **Add** button to open the Stage Action Definition dialog box.
 - This dialog box is dynamic and changes based on the Action Type (e.g., Activity and Work Track, Letter, and Seminar).



Action Type: Activity and Word Track Dialog Box



Action Type: Letter Dialog Box

The dialog box is titled "SmartOffice" and contains the following sections:

- Stage Action Definition:**
 - Stage Name: Needs Analysis
 - Action Type: Letter (dropdown menu)
 - Strategy: Flanking (dropdown menu)
 - Mandatory
- Description:** ABC (with a red checkmark icon)
Prospecting
- Letter to Be Activated with This Stage Action:**
Select Letter: Advisor - Appointment Request

Buttons: OK, Cancel

Action Type: Seminar Dialog Box (Optional module)

The dialog box is titled "SmartOffice" and contains the following sections:

- Stage Action Definition:**
 - Stage Name: Needs Analysis
 - Action Type: Seminar (dropdown menu)
 - Strategy: (empty dropdown menu)
 - Mandatory
- Description:** ABC (with a red checkmark icon)
(empty text area)
- Seminar to Be Activated with This Stage Action:**
Invite to Seminar: (empty text area)

Buttons: OK, Cancel

Internet icon at the bottom right.

Stage Action Field Descriptions

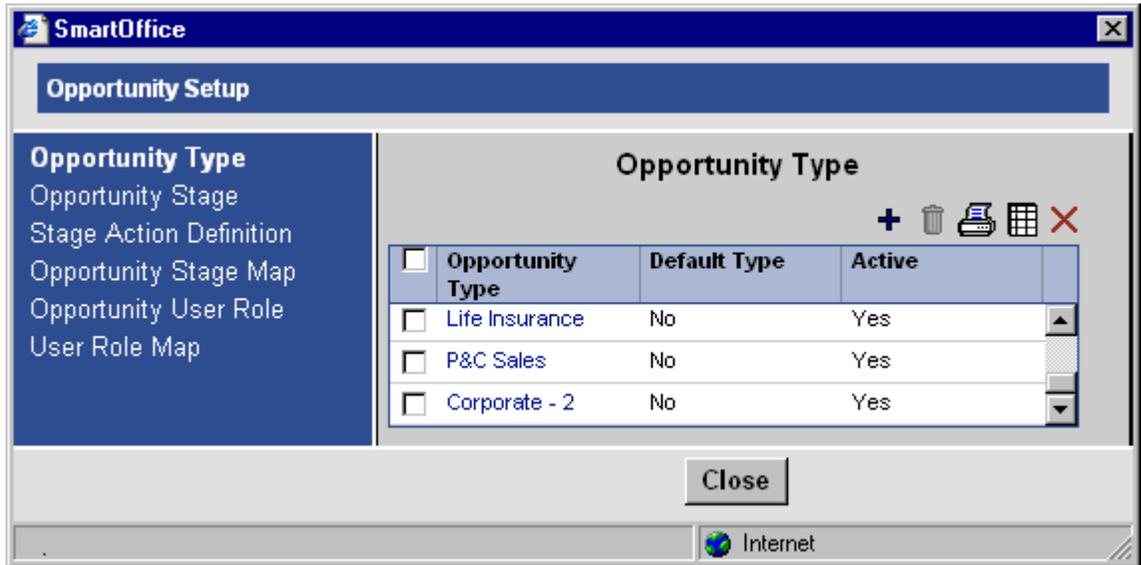
- **Stage Name** - The Stage Name is automatically entered.
 - **Action Type** - Action Types are actions associated with the respective stage. These display when the user selects the stage or strategy. Select an Action Type from the drop-down list.
 - Activity and Word Track
 - Letter
 - Seminar (Optional Module)
 - **Strategy** - Each strategy is associated with unique actions to best accommodate the situation. When a strategy changes, the action changes according to what is specified by the strategy. For each stage, select a Strategy from the drop-down list.
 - Defend
 - Develop
 - Flanking
 - Fragment
 - Frontal
 - **Mandatory** - Select this option if the Action is mandatory. Although the user can see that this action is mandatory, the application will not prevent the user from moving to another stage without completing mandatory actions.
1. Enter the appropriate information and then click the **OK** button. The Opportunity Stage opens with the newly created action.

The screenshot shows the 'Opportunity Stage' dialog box in SmartOffice. The 'Opportunity Type' is set to 'Corporate - 2'. The 'Stage Name' is 'Needs Analysis', 'Default Status' is 'In the funnel', 'Order' is '2', and 'Stage Probability (%)' is '25'. Below this is a table for 'Stage Action Definition' with columns for 'Stage Name', 'Action Type', and 'Mandatory'. The table contains one row for 'Needs Analysis' with 'Seminar' as the action type and 'No' as mandatory. A subtotal row shows 'Opportunity Type - Corporate - 2 (1)'. At the bottom are 'OK' and 'Cancel' buttons.

Stage Name	Action Type	Mandatory
<input type="checkbox"/> Needs Analysis	Seminar	No
Subtotal: Opportunity Type - Corporate - 2 (1)		

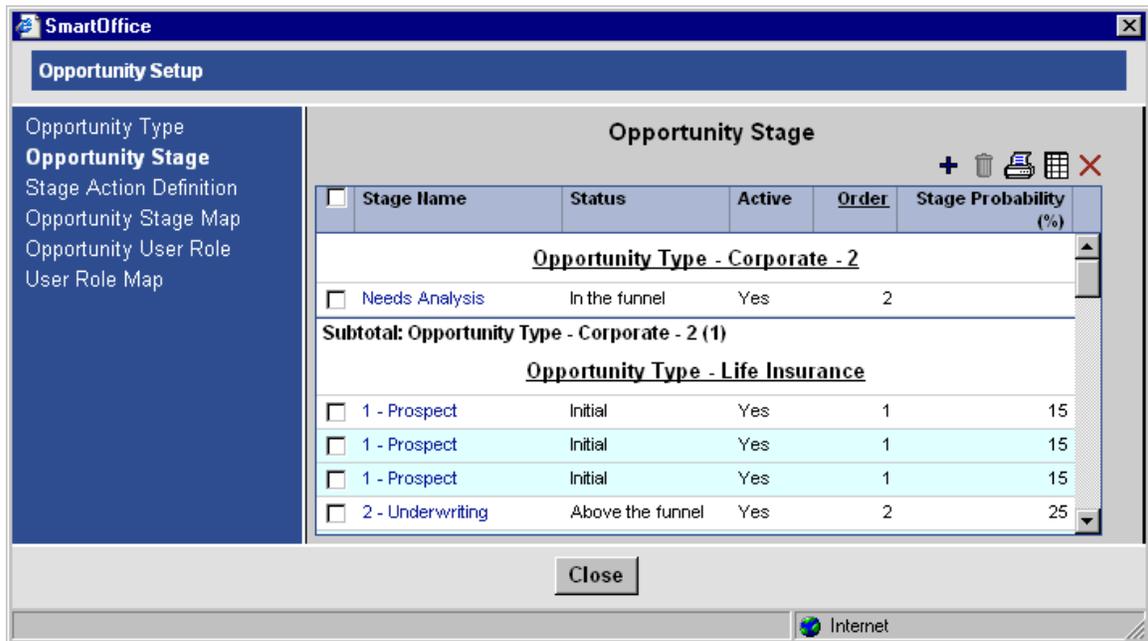
2. Click the **OK** button from the Opportunity Stage dialog box.

- The newly created Opportunity Type is saved and displayed on the Opportunity Type spreadsheet.



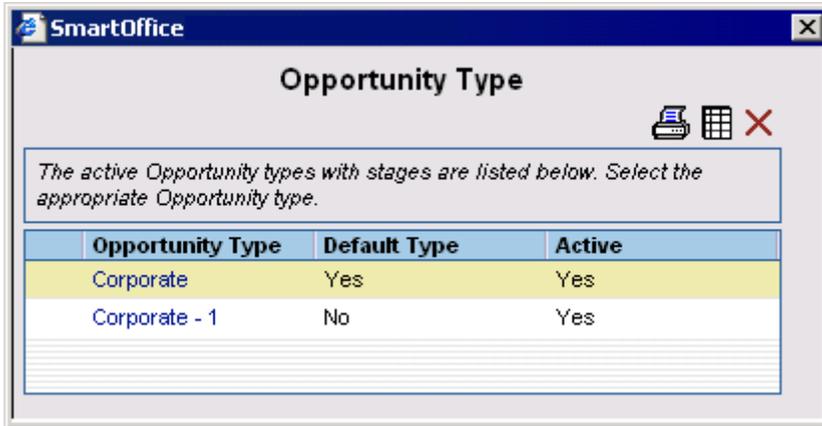
Opportunity Stage

From the Opportunity Setup dialog box, select **Opportunity Stage** to display the Opportunity Types and their respective stages. The user can add, modify, or delete the stages.

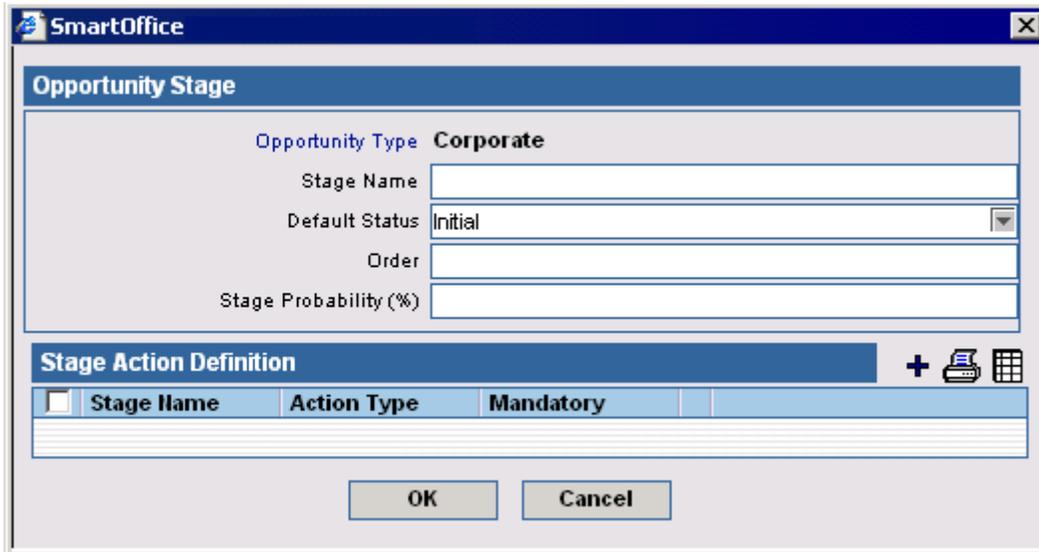


Add an Opportunity Stage

1. From the Opportunity Stage, click the **Add** button to open the Opportunity Type dialog box.
Note: Opportunity Types created at the System Office level do not display on this spreadsheet.



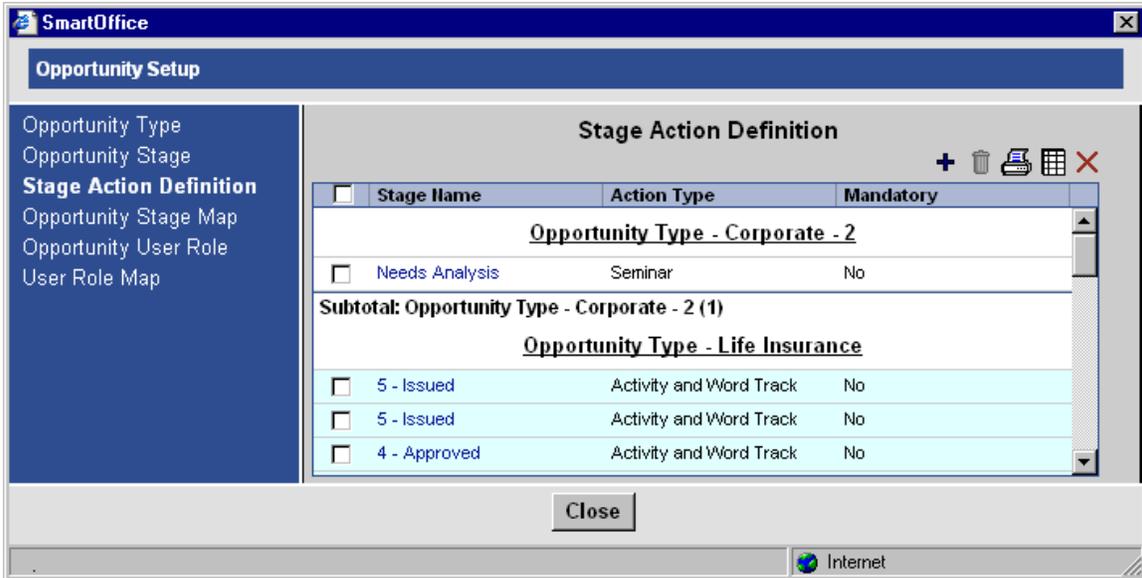
2. Select the appropriate Opportunity Type hyperlink to open the Opportunity Stage dialog box.



3. Enter the Opportunity Stage information and then click the **OK** button to display the newly entered opportunity on the Opportunity Stage spreadsheet.

Stage Action Definition

From the Opportunity Setup dialog box, select **Stage Action Definition** to display the Opportunity Types with their respective stages and actions. From this summary, the user can add, modify, or delete the stage's actions.



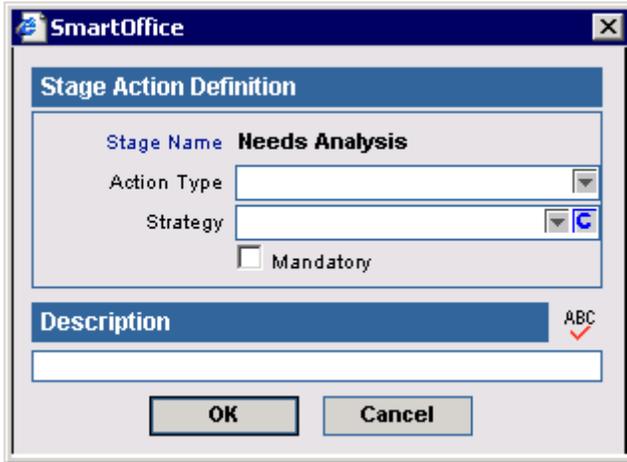
Add a Stage Action Definition

1. Click the **Add** button to open the Opportunity Stage dialog box.

Note: Opportunity Types created at the System Office level do not display on this spreadsheet.

Stage Name	Status	Active	Order	Stage Probability (%)
Opportunity Type - Corporate				
1 - Warm Prospect	Initial	Yes	1	15
2 - Needs Analysis	Above the funnel	Yes	2	25
3 - Educate/Present Solution	In the funnel	Yes	3	35
4 - Proposal	In the funnel	Yes	4	65
5 - Contracts	In the funnel	Yes	5	75
6 - Closed	Sale Made	Yes	6	100
7 - Sale Lost	Sale Lost	Yes	7	0
Subtotal: Opportunity Type - Corporate (7)				
Opportunity Type - Corporate - 1				
Need Analysis	In the funnel	Yes	2	25
Subtotal: Opportunity Type - Corporate - 1 (1)				

- In the Opportunity Type Corporate-2 section, select the **Needs Analysis** hyperlink to open the Stage Action Definition dialog box.



The dialog box is titled "SmartOffice" and "Stage Action Definition". It contains the following fields:

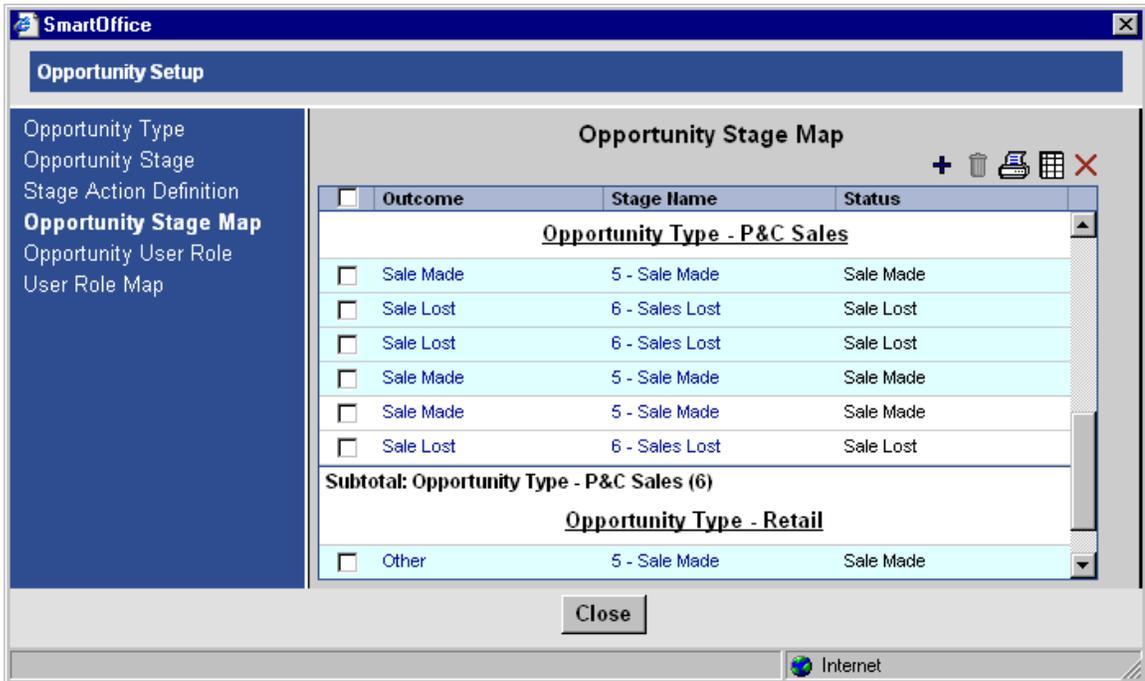
- Stage Name: Needs Analysis
- Action Type: [Dropdown menu]
- Strategy: [Dropdown menu]
- Mandatory:
- Description: [Text area] with a small "ABC" icon and a checkmark.
- Buttons: OK and Cancel.

- Enter the appropriate information and then click the **OK** button to save the action.

Opportunity Stage Map

Activity outcomes can be mapped to a stage to avoid changing the Stage/Status fields manually.

- From the Opportunity Setup dialog box, click the **Opportunity Stage Map** menu item.



The dialog box is titled "SmartOffice" and "Opportunity Setup". The "Opportunity Stage Map" section is active, showing a table with columns: Outcome, Stage Name, and Status. The table is divided into two sections: "Opportunity Type - P&C Sales" and "Opportunity Type - Retail".

Outcome	Stage Name	Status
Opportunity Type - P&C Sales		
<input type="checkbox"/> Sale Made	5 - Sale Made	Sale Made
<input type="checkbox"/> Sale Lost	6 - Sales Lost	Sale Lost
<input type="checkbox"/> Sale Lost	6 - Sales Lost	Sale Lost
<input type="checkbox"/> Sale Made	5 - Sale Made	Sale Made
<input type="checkbox"/> Sale Made	5 - Sale Made	Sale Made
<input type="checkbox"/> Sale Lost	6 - Sales Lost	Sale Lost
Subtotal: Opportunity Type - P&C Sales (6)		
Opportunity Type - Retail		
<input type="checkbox"/> Other	5 - Sale Made	Sale Made

Buttons: Close

- From the Opportunity Stage Map section, click the **Add** button to open the Opportunity Stage Map Detail dialog box.

- Click the **Opportunity Type** hyperlink to list all available Opportunity Types.

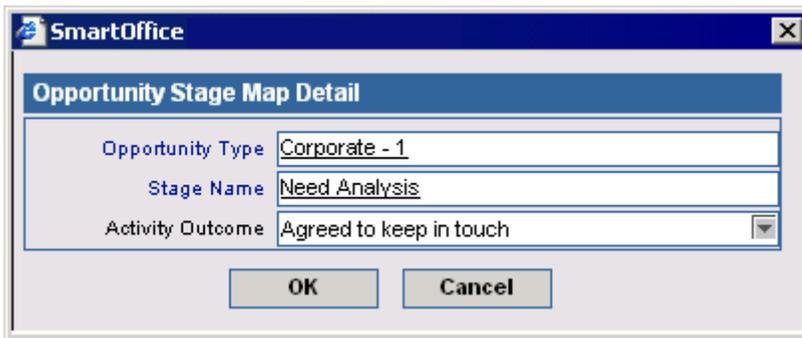
Opportunity Type	Default Type	Active
Corporate	Yes	Yes
Corporate - 1	No	Yes

- Select the appropriate Opportunity Type hyperlink to return to the Opportunity Stage Map Detail dialog box.

- Click the **Stage Name** hyperlink to open a list of Stages.

Stage Name	Status	Active	Order	Stage Probability (%)
Opportunity Type - Corporate - 1				
Need Analysis	In the funnel	Yes	2	25
Subtotal: Opportunity Type - Corporate - 1 (1)				

6. Select the appropriate Stage hyperlink to return to the Opportunity Stage Map Detail dialog box.

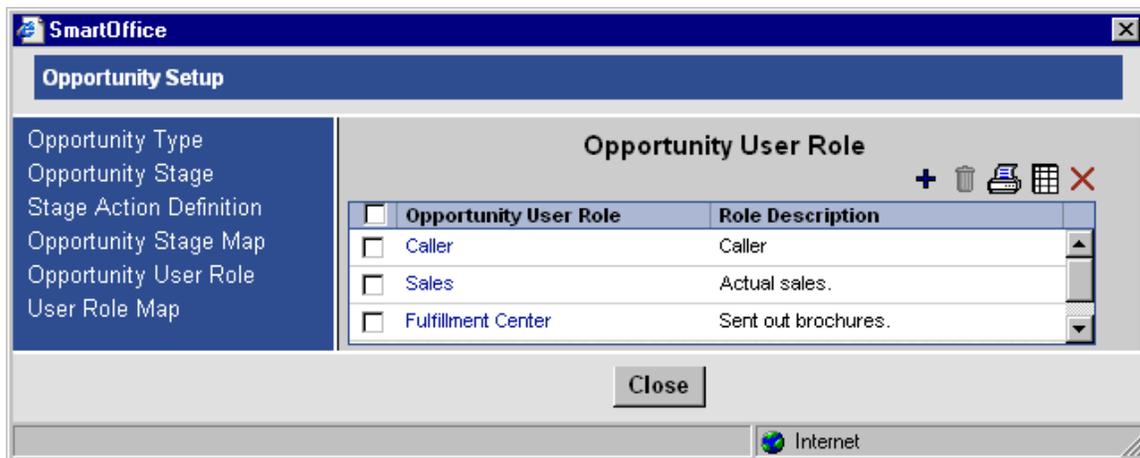


The dialog box is titled "SmartOffice" and "Opportunity Stage Map Detail". It contains three input fields: "Opportunity Type" with the value "Corporate - 1", "Stage Name" with the value "Need Analysis", and "Activity Outcome" with a dropdown menu showing "Agreed to keep in touch". At the bottom are "OK" and "Cancel" buttons.

7. From the Activity Outcome field, select the appropriate Outcome from the drop-down list.
8. Click the **OK** button to display the newly created Opportunity.

Opportunity User Role

From the Opportunity Setup dialog box, select **Opportunity User Role** to display the Opportunity User Roles with their respective Role Descriptions. From this summary, the user can add, modify, or delete the Opportunity User Roles.

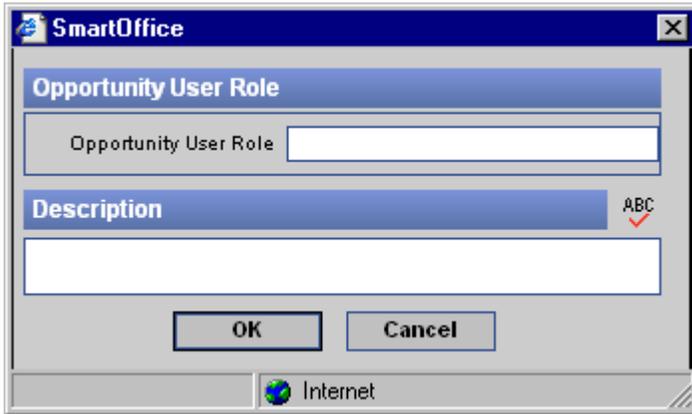


The dialog box is titled "SmartOffice" and "Opportunity Setup". It has a sidebar menu with options: "Opportunity Type", "Opportunity Stage", "Stage Action Definition", "Opportunity Stage Map", "Opportunity User Role", and "User Role Map". The main area is titled "Opportunity User Role" and contains a table with columns "Opportunity User Role" and "Role Description". The table has three rows: "Caller", "Sales", and "Fulfillment Center". Above the table are icons for adding (+), deleting (trash), printing, and refreshing (grid), and a close (X) icon. A "Close" button is at the bottom.

<input type="checkbox"/>	Opportunity User Role	Role Description
<input type="checkbox"/>	Caller	Caller
<input type="checkbox"/>	Sales	Actual sales.
<input type="checkbox"/>	Fulfillment Center	Sent out brochures.

Add an Opportunity User Role

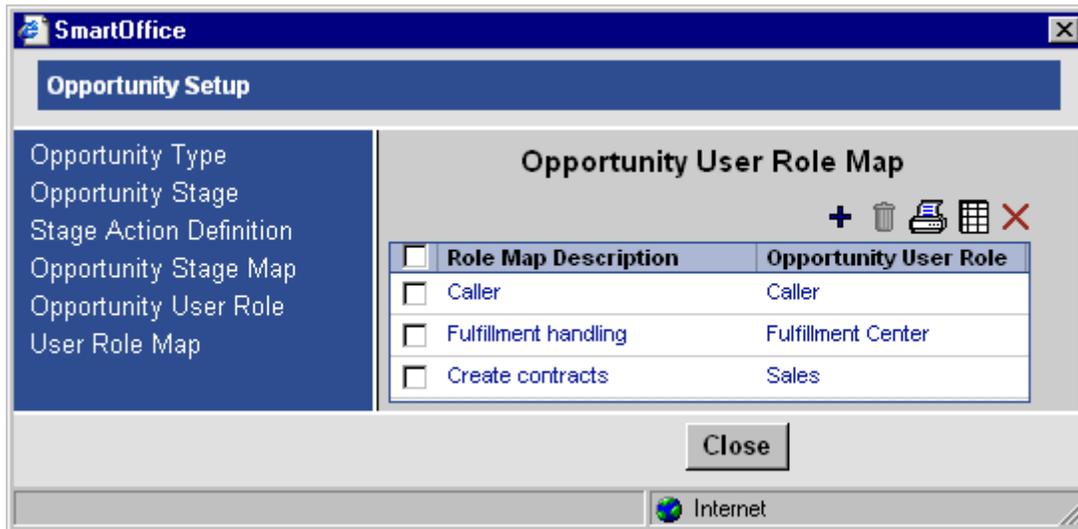
1. Click the **Add** button to open the Opportunity User Role dialog box.



2. Enter the Opportunity User Role and Description and then click the **OK** button to display the newly created Opportunity User Role on the spreadsheet.

User Role Map

From the Opportunity Setup dialog box, select **User Role Map** to display the Role Map Descriptions with their corresponding Opportunity User Roles. From this summary, the user can add, modify, or delete the User Role Maps.

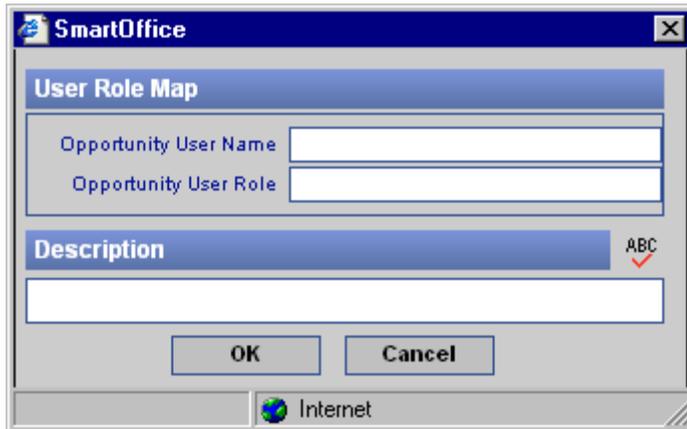


<input type="checkbox"/> Role Map Description	Opportunity User Role
<input type="checkbox"/> Caller	Caller
<input type="checkbox"/> Fulfillment handling	Fulfillment Center
<input type="checkbox"/> Create contracts	Sales

Add a User Role Map

Automatically created activities can be mapped to the Opportunity User Name, Opportunity User Role, or both, to avoid changing the User Assignment for the activity manually.

1. From the Opportunity User Role Map section, click the **Add** button to open the User Role Map dialog box.



The image shows a dialog box titled "SmartOffice" with a "User Role Map" section. It contains two input fields: "Opportunity User Name" and "Opportunity User Role". Below these is a "Description" field with a small "ABC" icon and a checkmark. At the bottom are "OK" and "Cancel" buttons. The status bar at the bottom indicates "Internet".

2. Click the **Opportunity User Name** hyperlink to open the Available Users dialog box.

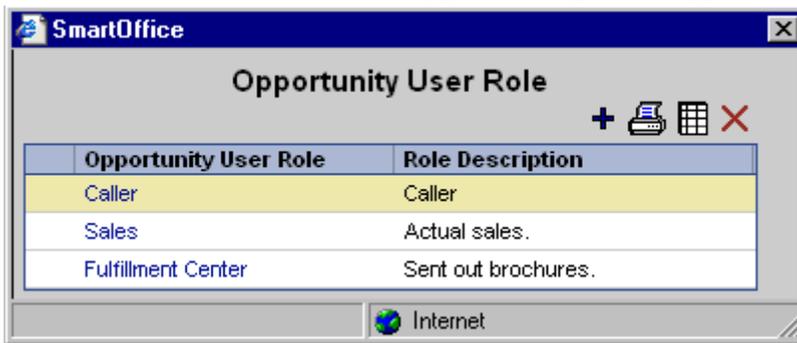


The image shows a dialog box titled "SmartOffice" with an "Available Users" section. It contains a message: "Please select one User from your Proxy Users." Below this is a table with two columns: "User Name" and "User Type". The table lists several users, with "Adam Jones" selected. At the bottom are "OK" and "Cancel" buttons. The status bar at the bottom indicates "Internet".

User Name	User Type
Adam Jones	Producer/Manager
Admin	Producer/Manager
William Richards	Advisor/Vu User
Carl M. Mathews	Advisor/Vu User
Chris Bartlett	Producer/Manager
Daniel Odell	Producer/Manager

3. Click the appropriate User Name hyperlink to display that user name in the Opportunity User Name field.

- Click the **Opportunity User Role** hyperlink to open the Opportunity User Role dialog box.

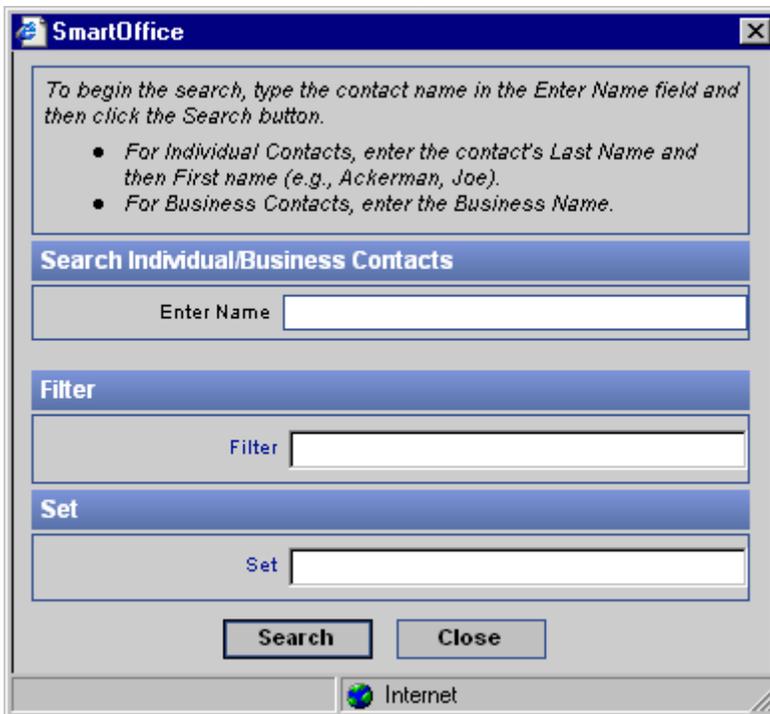


- Select the appropriate User Role hyperlink to display that User Role in the Opportunity User Role field.
- Click the **OK** button to add the new User Role Map to the spreadsheet.

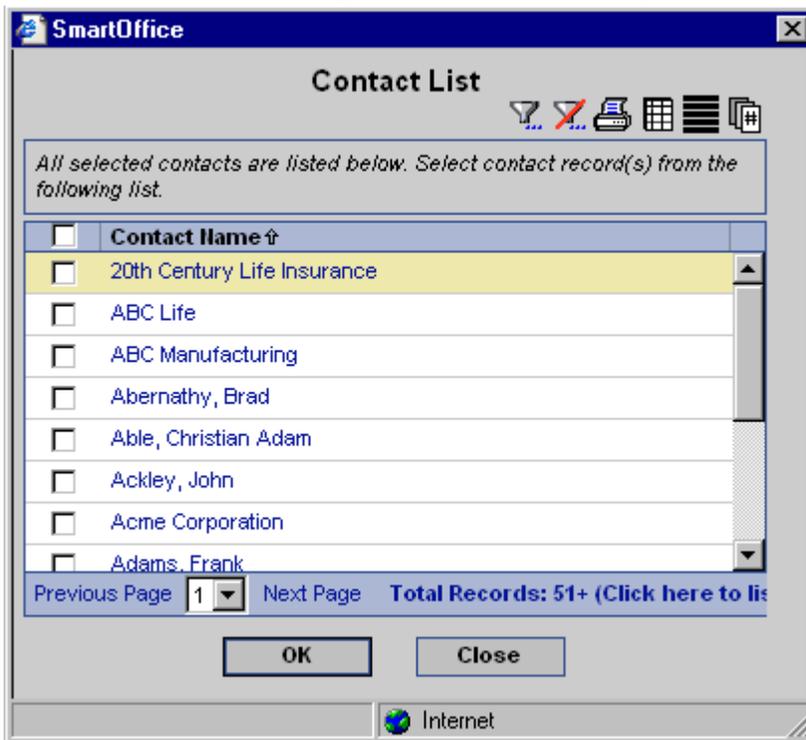
Opportunity Quick Add

Opportunities can be added from anywhere within the system.

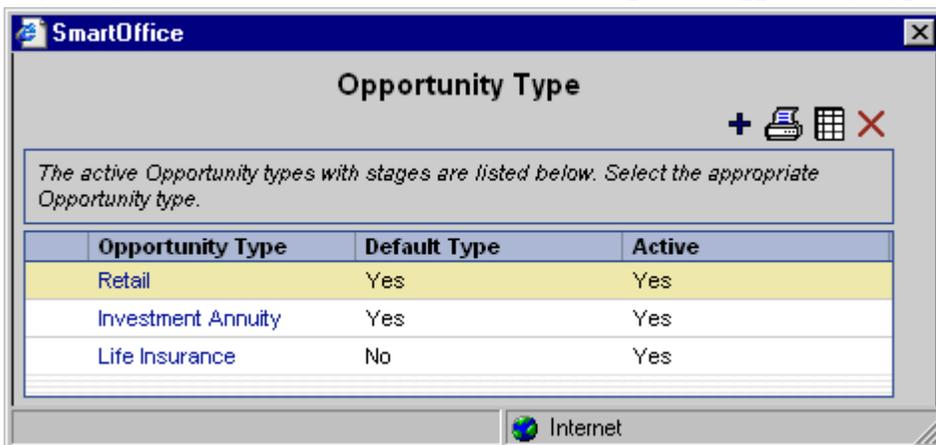
- From the bottom bar, click the **Opportunity Quick Add** button to open the Search Individual/Business Contacts dialog box.



2. Click the **Search** button to open the Contact List dialog box.



3. Tag a single record and then click the **OK** button to open the Opportunity Type dialog box.



4. Click the appropriate Opportunity Type hyperlink to open the Opportunity – New dialog box.

Opportunity - New

Opportunity Detail

Opportunity Type **Investment Annuity**

Contact Name **ABC Life**

Primary Owner

Campaign Name

Opportunity Name

Include in Forecast Status

Potential Revenue 0 Est. Close

Close Probability (%) Est. Revenue 0

Current Stage First Date

Previous Stage Date

Strategy

Main Business Driver

Competitive Strategy

Relationship Strength

Territory

Related Contacts

Role	Contact Name
------	--------------

Action

Action Type	Mandato	Complet	Activity Type	Description
-------------	---------	---------	---------------	-------------

OK Cancel

5. Click the **Campaign Name** hyperlink to open the Campaign Search dialog box.

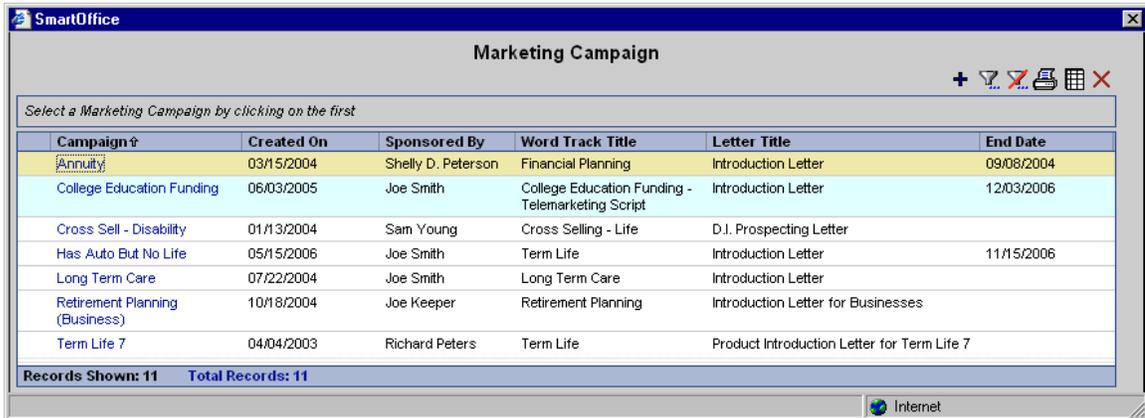
Campaign Search

Campaign Name

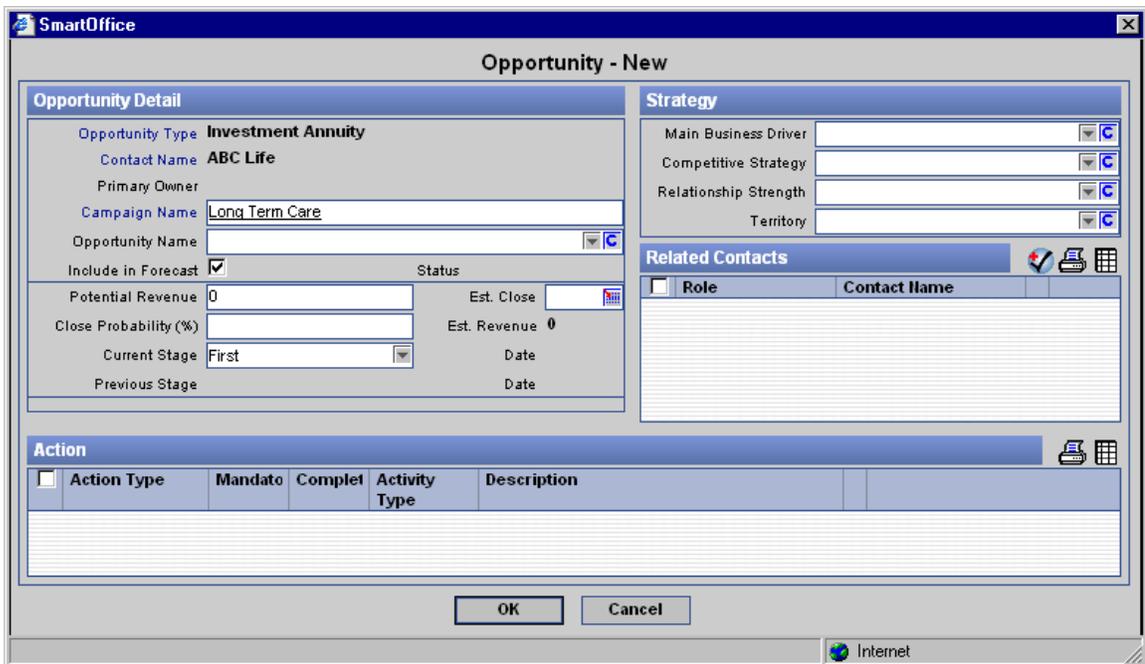
Sponsored By

Search Add Close

- Click the **Search** button to open Marketing Campaign dialog box.



- Select the appropriate Campaign hyperlink to return to the Opportunity – New dialog box.



- Enter the appropriate information and then click the **OK** button to save the Opportunity.

Opportunity Summary

To Display all Opportunities

1. Select **Opportunity Search** from the expanded **Opportunity** menu to open the Opportunity Search dialog box.

Note: The Search by Owners option only displays when the user has Group Reporting rights from the User Roles/License tab (under User Management).

The screenshot shows the 'Opportunity Search' dialog box in the SmartOffice application. The dialog box is titled 'SmartOffice' and 'Opportunity Search'. It contains several input fields: 'Opportunity Name' (text), 'Opportunity Type' (dropdown menu with 'All' selected), 'Contact Name' (text), 'Contact Source' (dropdown menu), 'Campaign Name' (text), and 'Status' (dropdown menu with 'All Active' selected). There is a checked checkbox for 'Search by Owner(s)'. Below this is a section titled 'Owners' with instructions: 'Select one or more users. Click the checkbox below to select more than 4 users.' It lists 'User-1' through 'User-4' with corresponding text input fields. A checkbox for 'Select additional users.' is present. At the bottom is a 'Filter' section with a text input field. Buttons for 'Search', 'Add', and 'Close' are at the bottom. The status bar shows 'Internet'.

Search Opportunity Dialog Box Fields

- **Opportunity Name** – Enter the Opportunity Name.
- **Opportunity Type** – Select the Opportunity Type from the drop-down list.
- **Contact Name** – This is a hyperlinked field. Enter the name of the contact.
- **Contact Source** – Select the Contact Source from the drop-down list.
 - All
 - Direct Marketing
 - Personal Observation
 - Referral
 - Seminar
 - Unassigned Policyholder
- **Search by Owners** – Select this option to display another section in the dialog box called Owners. The user can search for up to four users. If additional users are required in the search condition, select the **Select Additional Users** option.
- **Filter** - Enter a filter name to use as the search condition.

- Click the **Search** button to display the Opportunity Summary.

Opportunity Summary

Opportunity Type Status

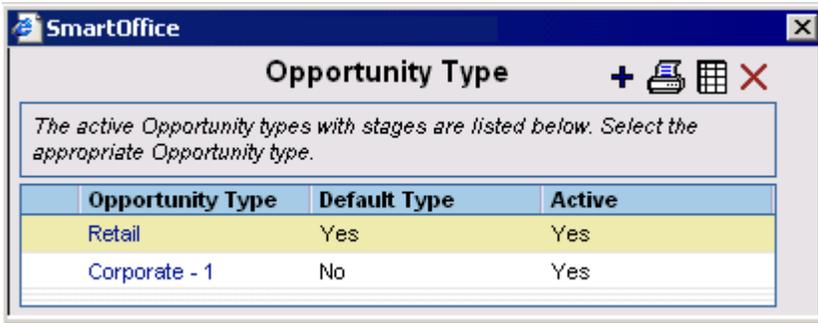
<input type="checkbox"/> Current Stage Date	Contact Name	Campaign	Est. Close	Est. Revenue	Potential Revenue	Primary Owner
Stage Name - 5 - Issued						
<input type="checkbox"/> 06/06/2005	McNelson, Richard	Cross Sell - Annuity	12/28/2005	9,375	12,500	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Martin, Melanie		12/28/2005	9,375	12,500	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Flores, Miquel		12/28/2005	4,875	6,500	Norma Peterson
Subtotal: Stage Name - 5 - Issued (3)					31,500	
Stage Name - 4 - Approved						
<input type="checkbox"/> 06/06/2005	Simmons, Patrick		01/17/2006	1,137	1,750	Norma Peterson
<input type="checkbox"/> 06/06/2005	McClave, Bradley M.	Long Term Care	01/23/2006	262	1,750	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Alonzo, Helena L		01/23/2006	225	1,500	Phillip Anderson
Subtotal: Stage Name - 4 - Approved (3)					5,000	
Stage Name - 3 - Awaiting Approval						
<input type="checkbox"/> 06/06/2005	Fernandes, Novelyn		01/24/2006	2,012	5,750	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Ackerman, Joseph M.		01/17/2006	1,260	3,600	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Badinas, Samuel G	Long Term Care	01/17/2006	225	1,500	Phillip Anderson
<input type="checkbox"/> 06/06/2005	Martin, Tom	Cross Sell - Annuity	02/21/2006	437	1,250	Norma Peterson
Subtotal: Stage Name - 3 - Awaiting Approval (4)					12,100	

Previous Page Next Page Total Records: 51+ (Click here to list all)

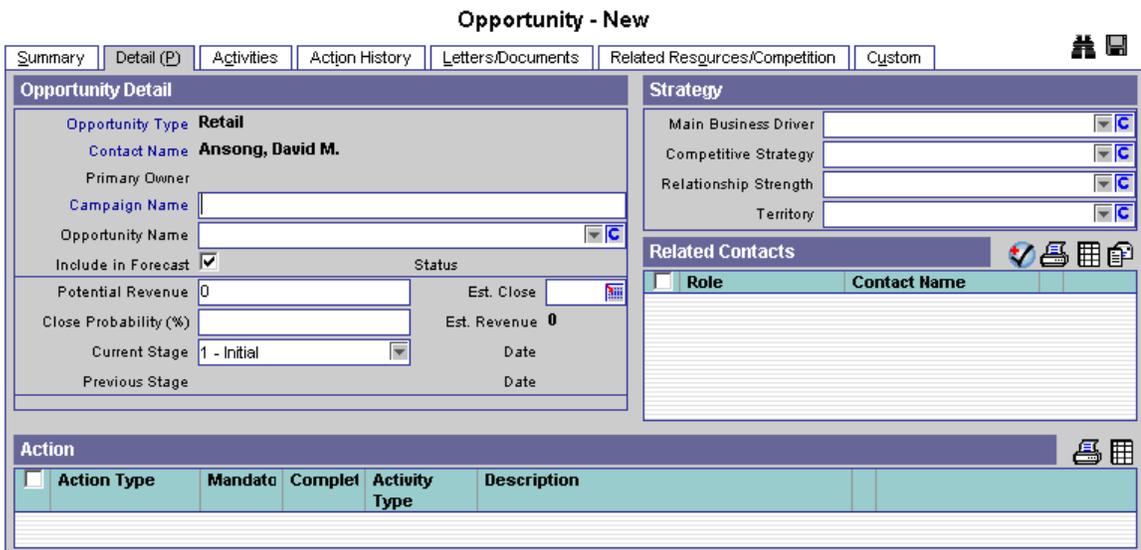
- Select the appropriate Opportunity Type from the corresponding drop-down list.
- Select the appropriate Status from the corresponding drop-down list.
 - All
 - Initial
 - Above the Funnel
 - In the Funnel
 - Inactive
 - Sales Made
 - Sales Lost
 - All Active
 - All Inactive
- To display more information, select a record and then click any of the following tabs: **Detail**, **Activities**, **Action History**, **Letters/Documents**, **Related Resources/Competition**, and **Custom**.
- The Opportunity Specific SmartPad, Run Opportunity Related Reports, Mass Modify Opportunity Primary Owner, Mass Modify Opportunity Stages, Status Update, and Navigate to the linked Policy/PCM buttons are unique to the Opportunity module. Click these buttons to access the corresponding features.

Add an Opportunity

1. From the Opportunity Summary tab, click the **Add** button to open the Opportunity Type dialog box.



2. Select an Opportunity Type hyperlink to open the Contact Search Options (Individual/Business) dialog box.
3. Click the **Search** button to open the Contact Summary.
4. Click a Contact Name hyperlink to open the Opportunity - New Detail tab.

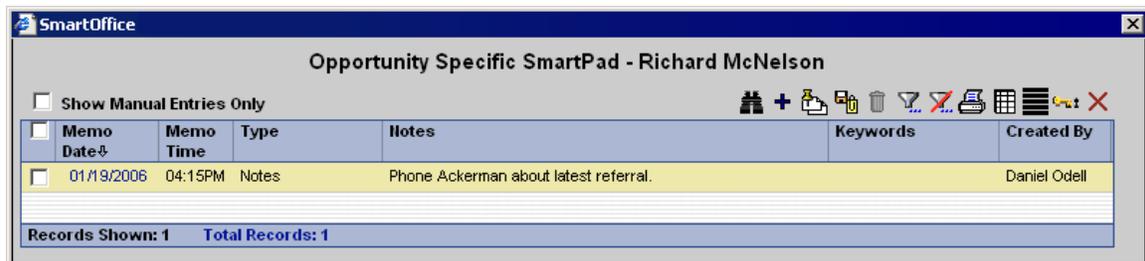


5. Enter the Opportunity Detail information and then click the **Save** button.

Opportunity Specific SmartPad

To view all of the specific notes for an Opportunity

From the Opportunity Summary tab, select an opportunity and then click the **Opportunity Specific SmartPad** button to open the Opportunity Specific SmartPad dialog box.



Run Opportunity Related Reports

1. From the Opportunity Summary tab, click the **Run Opportunity Related Reports** button to open the Select Opportunity Report dialog box.

Note: The Available User dialog box opens for those users with proxies. Select the appropriate user(s) and then click the **OK** button.



2. In the Select Opportunity Type for Report section, select the appropriate Opportunity Type from the drop-down list.
3. Select the appropriate options in the Opportunity Report and Additional Options sections and then click the **OK** button to generate the report.

Mass Modify Opportunity Primary Owner

1. From the Opportunity Summary tab, select those records for which the owner is to be changed.
2. Select the **Mass Modify Opportunity Primary Owner** button to open the List of Users dialog box.

Note: The Mass Modify Opportunity Primary Owner feature is only available to those users with Mass Assignment rights from the User Roles/Licenses tab.
3. Select the appropriate user hyperlink to designate the new Opportunity owner.

Mass Modify Opportunity Stage

1. From the Opportunity Summary tab, select those records for which the stage will be changed.
2. Select the **Mass Modify Opportunity Stage** button to open the Opportunity Type dialog box.

Note: The Mass Modify Opportunity Primary Owner feature is only available to those users with Mass Assignment rights from the User Roles/Licenses tab.
3. Select the appropriate stage hyperlink. The application refreshes and the selected Opportunities display with the newly selected stages.

Status Update

1. From the Opportunity Summary tab, select a record where the status of the opportunity needs to be updated.
2. Click the **Status Update** button to open the Activity Outcome dialog box.

Memo Date	Memo Time	Open Link	Notes
<input type="checkbox"/>	06/21/2006 01:58PM		Call was scheduled for 06/21/2006 (Done) - Initial call
<input type="checkbox"/>	06/21/2006 01:54PM		Title: Introduction Letter
<input type="checkbox"/>	06/21/2006 01:53PM		Contact created on 06/21/2006 at 10:53AM

Activity Outcome Notes ABC ✓

Opportunity Information

Opportunity Name: College Education Funding
Current Stage: 4 - Case Closed
Change Stage to: 1 - Initial
Potential Revenue: 2,500
Est. Close: 07/21/2006
Actual Sell Amount:

Next Action Information

Next Action On:
Assigned To: Mark Paladian
 Check Participant(s) Availability
 Open Calendar Activity

Activity Outcome Options

<input checked="" type="radio"/> Appointment Made	<input type="radio"/> Working with Competitor
<input type="radio"/> Call Back	<input type="radio"/> Already Have It
<input type="radio"/> Do Not Call	<input type="radio"/> Agreed to Keep in Touch
<input type="radio"/> Not Interested	<input type="radio"/> Sale Made
<input type="radio"/> In the Process of Making a Decision	<input type="radio"/> Sale Lost
<input type="radio"/> Reschedule	<input type="radio"/> Other

OK Cancel

Internet

3. Select the appropriate options and then click the **OK** button to save the information.

Opportunity Activity Outcome Descriptions

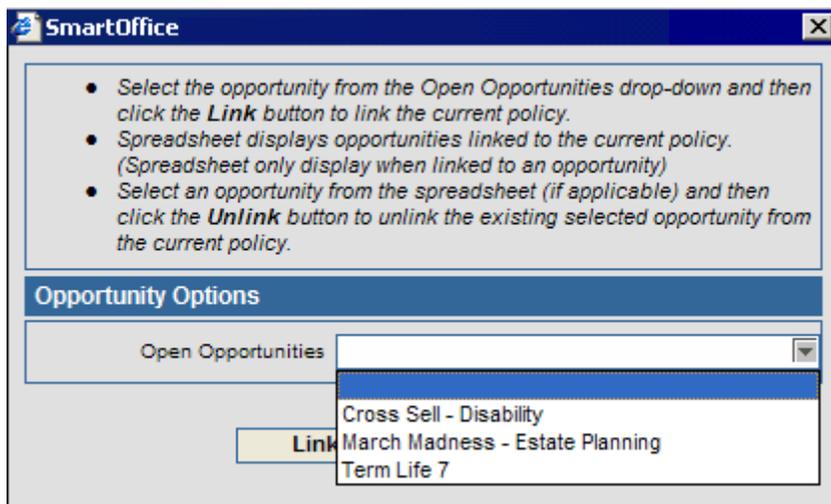
- **SmartPad** – Displays the ten latest SmartPad notes.
- **Activity Outcome Notes** – Enter additional information regarding the opportunity. The data entered will be posted to the SmartPad.
- **Opportunity Name** - The opportunity type is automatically entered.
- **Next Action On** - Enter the date/time of the next Appointment Made, Call Back, and Agreed to Keep in Touch actions to create an activity.

- **Current Stage** - The Current Stage is automatically entered.
- **Change Stage To** - From the drop-down field, select the appropriate stage of the Opportunity. Changes made will be reflected on the Opportunity Detail tab.
- **Appointment Made, Call Back Agreed to Keep in Touch, and Reschedule** – When these options are selected, the Next Action On field is mandatory.
- **Potential Revenue** and **Est. Close** – Enter the potential amount of the opportunity and when the Opportunity is expected to close. These changes are reflected on the Opportunity Detail tab.
- **Assigned To** – Enter the User Name to which the current activity needs to be assigned.
- **Check Participants Availability** – Shows the Users’ availability. The red color signifies that the user is either busy or out of office and activity cannot be created for that period. The green color signifies that the user is available for the activity.
- **Open Calendar Activity** – This will open the Activity Detail dialog box.

Link to SmartCaseManager and SmartPolicies Records

Opportunity records can be linked to SmartCaseManager and SmartPolicies records.

1. After creating both an Opportunity and a SmartCaseManager record, from the Pending Case Summary, select the record that is to be associated with the Opportunity record.
2. Click the **Link Opportunity** button to open the Opportunity Options dialog box.
3. From the Opportunity List, select the appropriate opportunity from the drop-down list and then click the **Link** button.



4. To see the linked opportunity from the PCM Summary, click the **Show Linked Opportunity** button.
5. The Opportunity Detail tab displays (follow the above steps to link SmartPolicies information starting from the Policy Summary).

Opportunity Link

1. To view the PCM and Policy records from the Opportunity record, identify the Opportunity record that is linked to a PCM or Policy record.
2. From the Opportunity Summary, select the appropriate record and then click the **Navigate to the Linked Policy/PCM** button.
3. The applicable Policy or PCM record displays.

- **Status** - The Status is defined in the Setup dialog box for Opportunity Stages. The Status field displays the following statuses:
 - Initial
 - Above the Funnel
 - In the Funnel
 - Inactive
 - Sale Made
 - Sale Lost
- **Potential Revenue** - The potential revenue is an estimated amount of business that is expected from the Opportunity.
- **Estimated Close** - Enter the expected closing date for the Opportunity.
- **Closing Probability (%)** - Enter the probability of the sale being made.
- **Estimated Revenue** - The Estimated Revenue is the amount that is expected after multiplying the Potential Revenue and the Closing Probability.
- **Current Stage** - Select the Current Stage from the drop-down list. To display the Opportunity Stage History, click **Opportunity Stage History**.
- **Current Stage Date** - The Current Stage Date displays the last changed date.
- **Previous Stage** - The stage before the Current Stage displays.
- **Previous Stage Date** - The previous stage's date displays.

Sales Made

If the stage status is Sale Made, the following fields are displayed:

Opportunity Detail	
Opportunity Type	Corporate - 1
Contact Name	Davis, Randy
Primary Owner	Phillip Anderson ...
Campaign Name	<input type="text"/>
Opportunity Name	Randy Davis ▼ C
Include in Forecast	<input checked="" type="checkbox"/> Status Sale Made
Potential Revenue	<input type="text" value="25,000"/> Est. Close <input type="text"/>
Close Probability (%)	<input type="text" value="100"/> Est. Revenue 25,000
Current Stage	<input type="text" value="Closed"/> ▼ ... Date 11/15/2005
Previous Stage	Fact Finding Date 11/15/2005
Last Activity Outcome	Sale Made
Last Activity Date	11/14/2005
Actual Sale Amount	<input type="text" value="25,000.00"/> Sale Date <input type="text"/>
Win Reason	<input type="text" value="Price"/> ▼ C

- **Actual Sales Amount** - Enter the amount of the sale.
- **Sales Date** - Enter the sales amount.
- **Win Reason** - The Win Reason field displays the following system choices:
 - Price
 - Product
 - Service

The user can define additional choices by selecting the **C** (Customize) button.

Sales Lost

If the stage status is Sale Lost, the Lost Reason field displays:

Opportunity Detail	
Opportunity Type	Corporate - 1
Contact Name	Davis, Randy
Primary Owner	Phillip Anderson
Campaign Name	
Opportunity Name	Randy Davis
Include in Forecast	<input checked="" type="checkbox"/> Status Sale Lost
Potential Revenue	25,000
Est. Close	
Close Probability (%)	0
Est. Revenue	0
Current Stage	Sale Lost
Date	11/15/2005
Previous Stage	Fact Finding
Date	11/15/2005
Last Activity Outcome	Sale Lost
Last Activity Date	11/14/2005
Lost Reason	

- **Lost Reason** - The Lost Reason field displays the following system choices:
 - Competition
 - Note needed
 - Too expensive

The user can define additional choices by selecting the **C** (Customize) button.

Strategy

Strategy	
Main Business Driver	Acquisition Mode
Competitive Strategy	Develop
Relationship Strength	Excluded
Territory	NW

- **Main Business Driver** - This field displays the Main Business Driver. Changes made to this field are posted to the SmartPad. There are three system choices by default but additional choices can be added by clicking the **C** (Customize) button.

The system choices:

- Acquisition Mode
- Aging/Legacy Platform
- Replacement Platform

- **Competitive Strategy** - This field displays the Competitive Strategy. Changes made to this field are posted to the SmartPad. There are five system choices by default but additional choices can be added by clicking the **C** (Customize) button.

The system choices:

- Defend
- Develop
- Flanking
- Fragment
- Frontal

Note: Selecting a different strategy opens a dialog box with the message, “Changing competition strategy will recreate incomplete actions accordingly to the new strategy.”

- **Relationship Strength** - This field displays the Relationship Strength. Changes made to this field are posted to the SmartPad. There are five system choices by default but additional choices can be added by clicking the **C** (Customize) button. The system choices:

- Challenger
- Excluded
- Preferred Vendor
- Trusted Advisor
- Vendor Among Many

- **Territory** - This field displays the Territory. Changes made to this field are posted to the SmartPad. Choices can be added by clicking the **C** (Customize) button.

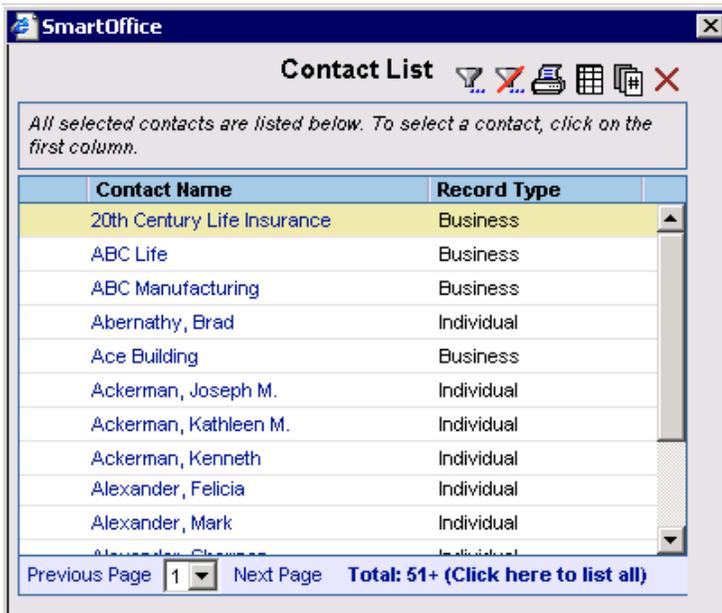
Related Contacts

Related Contacts are family members or business associates that are associated with the Opportunity.

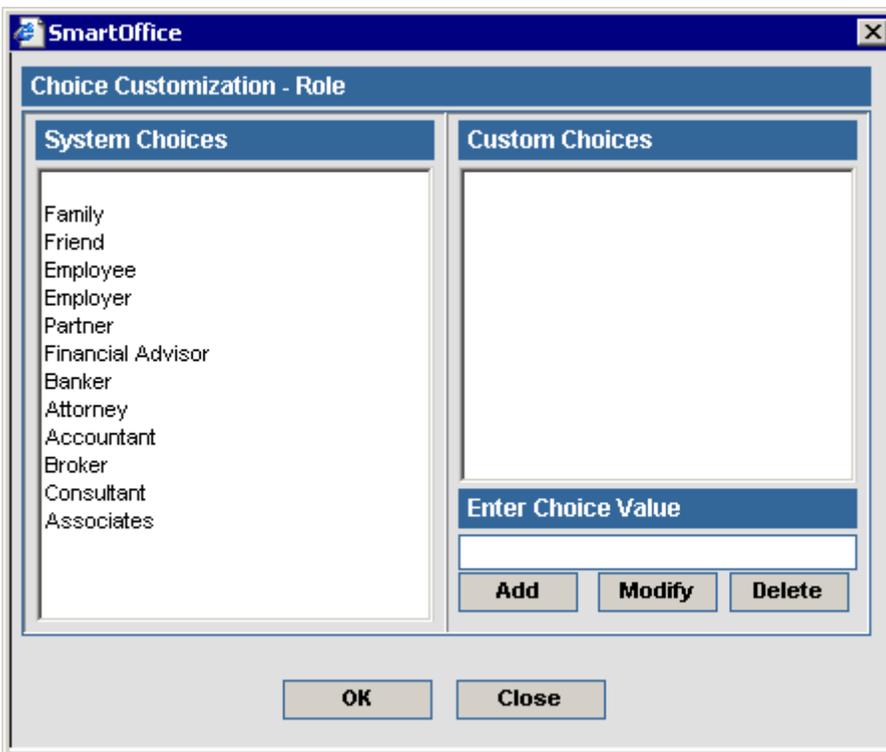
Add Related Contacts

1. From the Opportunity Detail tab, click the **Add** button in the Related Contacts section to open the Opportunity Related Contact dialog box.

2. Select the Related Contact name by clicking the **Related Contact** hyperlink to open the Individual Contact list. To review a list of all Key Relation contacts, click the **Selection** button next to the Related Contact field (List All Relations button).



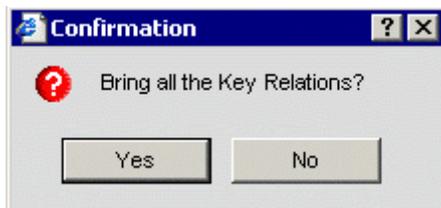
3. Select the appropriate Contact Name hyperlink to enter the information into the Related Contact field.
4. Select the Contact Role from the drop-down list; or, click the C (Customize) button to open the Choice Customization dialog box.



5. Enter the custom choice in the Enter Choice Value field and then click the **Add** button.
 6. Click the **OK** button to save the information and then click the **Yes** button to refresh the page.
- **Professional Win** - Enter the business goal of the contact (e.g., promotion).
 - **Personal Win** - Enter the personal goal of the contact (e.g., spending time with family, being at home around 7:00 pm).
 - **Power Rating** - The Power Rating field displays the following statuses:
 - Approver
 - Decision Maker
 - Evaluator
 - User
 - **Personal Type** - The Personal Type field displays the following statuses:
 - Enemy
 - Mentor/Coach
 - Neutral
 - Nonsupporter
 - Support

Add Key Relations

1. In the Related Contacts section, click the **Add Related Contacts from Key Relations** button to open the Bring all the Key Relations dialog box.



2. Click the **Yes** button to add the Key Relations.
Note: If no Key Relations exist, the No Key Relations found for this Contact dialog box displays.
3. All the Key Relations from the contact record are displayed in the Related Contacts section. The Role column displays as None.

Action

The Action section displays all the actions that are associated with a stage. The actions should have been already defined when the user was creating the Setup. However, a user can still add additional actions for a specific opportunity stage, although the new actions will not be included in the Setup.

Action Summary

The Stages drop-down list displays the various stages for the current Opportunity Type. The Show All Completed Actions, Show All Actions, Mark Stage Action(s) Complete and Execute Action buttons are unique to the Action Summary section. Click these buttons to access the corresponding features.

Note: After an Opportunity is created and assigned to a stage with Actions, any additional Actions created from the Setup are not displayed in the opportunity stage. The Actions listed are only retrieved once.

Show All Completed Actions/Show All Actions

1. From the Action Summary, click the **Show All Completed Actions** button to display all the actions that are completed.

Note: The Show All Completed Actions button toggles to the Show All Actions button.

2. To return to a complete list of all actions, click the **Show All Actions** button.

Mark Stage Action(s) Complete

1. From the Action Summary, select an action to be changed.
2. Click the **Mark Stage Action(s) Complete** button.
3. The Completed column changes to Yes.

Note: If the action is already completed and the user clicks the **Mark Stage Action(s) Complete** button, a dialog box with the following message opens, “One or more of the tagged Actions are already complete...” and no action occurs.

Execute Actions

1. From the Action Summary, select an action that has not already been performed.

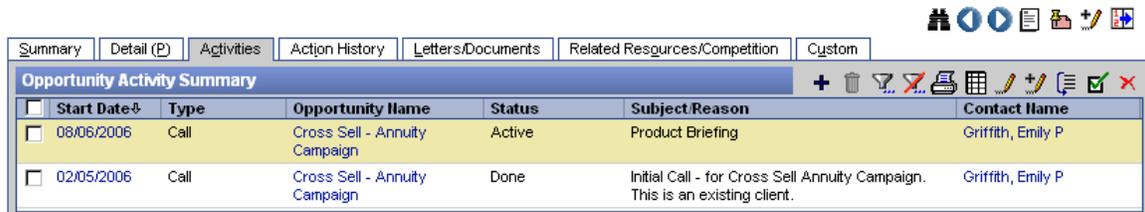
Note: The action type must have Activity and Word Track, Letter, and Seminar (optional module) selected. If no action type is defined, a dialog box opens with the message, “No actions are defined”.

2. Click the **Execute Actions** button. Depending on the Action Type, one of the following displays:
 - For the **Activity and Work Track** Action Type - An Activity dialog box prompts the creation of an activity.
 - For the **Letter** Action Type - The specified letter is generated.
 - For the **Seminar** Action Type - The opportunity is invited to an existing seminar.
3. After completion, the Completed column is updated to Yes.

Opportunity Activities

The Activities tab displays only those activities associated with the Opportunity.

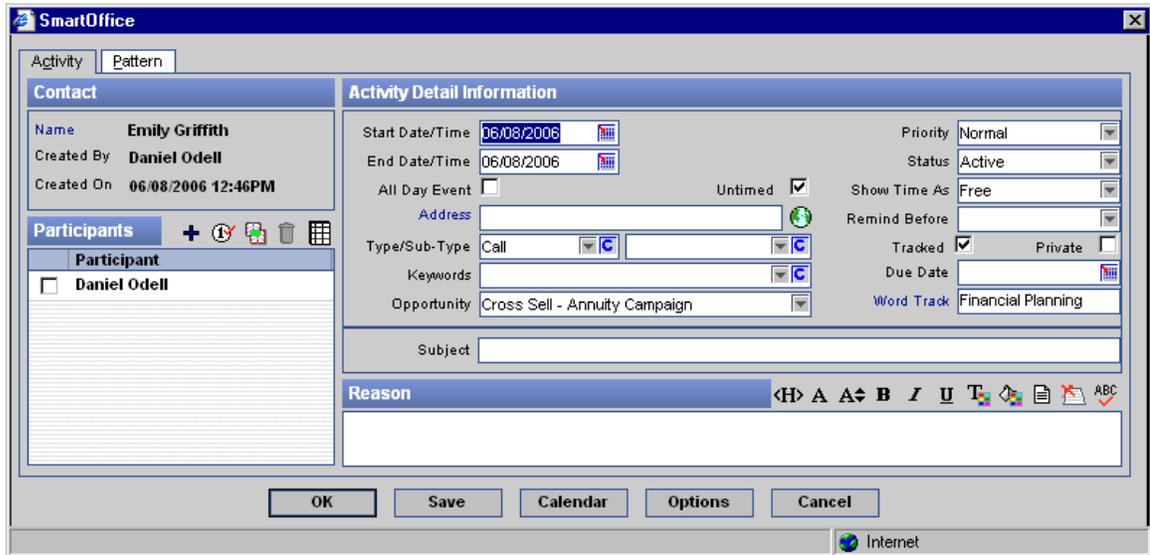
Opportunity - **Emily Griffith** - Cross Sell - Annuity Campaign



Start Date	Type	Opportunity Name	Status	Subject/Reason	Contact Name
08/06/2006	Call	Cross Sell - Annuity Campaign	Active	Product Briefing	Griffith, Emily P
02/05/2006	Call	Cross Sell - Annuity Campaign	Done	Initial Call - for Cross Sell Annuity Campaign. This is an existing client.	Griffith, Emily P

Add an Activity

1. From the Activities tab, click the **Add** button to open the Activity Detail dialog box.



The image shows the 'SmartOffice' Activity Detail dialog box. It is divided into several sections:

- Contact:** Name: Emily Griffith, Created By: Daniel Odell, Created On: 06/08/2006 12:46PM.
- Activity Detail Information:**
 - Start Date/Time: 06/08/2006, End Date/Time: 06/08/2006.
 - All Day Event: Untimed:
 - Priority: Normal, Status: Active, Show Time As: Free.
 - Address: (empty field)
 - Remind Before: (empty field)
 - Type/Sub-Type: Call, Tracked: Private:
 - Keywords: (empty field)
 - Due Date: (empty field)
 - Opportunity: Cross Sell - Annuity Campaign, Word Track: Financial Planning.
 - Subject: (empty field)
- Participants:** A list with one participant: Daniel Odell.
- Reason:** A text area with a rich text toolbar (bold, italic, underline, etc.).

Buttons at the bottom: OK, Save, Calendar, Options, Cancel. A status bar at the bottom right shows 'Internet'.

Note: The Opportunity field defaults to the current opportunity.

2. Enter the Activity Details and then click the **OK** button to save the activity.
3. The newly created activity displays on the Activities tab.

Action History Tab

The Action History tab records the tracked activities and letters associated with the Opportunity.

Opportunity - Emily Griffith - Cross Sell - Annuity Campaign

Summary Detail (P) Activities Action History Letters/Documents Related Resources/Competition Custom

Action Time	Remarks
06/08/2006 12:46PM	
02/06/2006 11:42AM	Product Briefing
02/05/2006 08:38PM	Initial Call - for Cross Sell Annuity Campaign. This is an existing client.
02/05/2006 11:41AM	Obtained next apptmnt
02/05/2006 11:41AM	
02/05/2006 11:41AM	

Records Shown: 6 Total Records: 6

Letters/Documents Tab

The Letters/Documents tab tracks all Letters and Documents that were sent for an Opportunity.

Opportunity - Christian Able - Annuity

Summary | Detail (P) | Activities | Action History | Letters/Documents | Related Resources/Competition | Custom

Letter Log

All | Investment | Insurance | Personal | Taxes | Legal | Estate | Miscellaneous

<input type="checkbox"/>	Letter Title	Open	Keyword	Created On	Created By
<input type="checkbox"/>	Advisor - Appointment Request		Advisor - Appointment Request	05/08/2006 03:01PM	Admin
<input type="checkbox"/>	Wholesaler - Annuity Marketing Material		Wholesaler	03/29/2005 03:34PM	Chris Bartlett

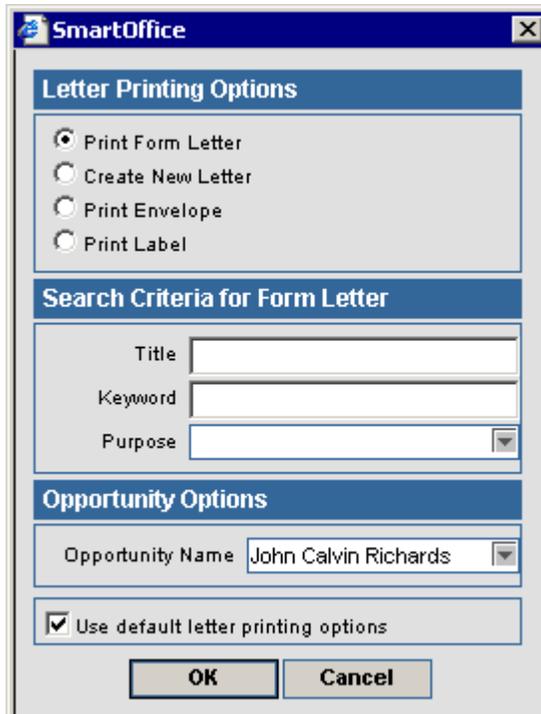
Document Summary

All | Investment | Insurance | Personal | Taxes | Legal | Estate | Miscellaneous

<input type="checkbox"/>	Description	Open	Keyword	Created On
<input type="checkbox"/>				

Print Letter

1. To print and post the letter to the Opportunity Letter Log section, click the **Add** button to open the Letter Printing Options dialog box.
2. From the Letter Printing Options dialog box, select the Opportunity Name.



SmartOffice

Letter Printing Options

Print Form Letter
 Create New Letter
 Print Envelope
 Print Label

Search Criteria for Form Letter

Title:
Keyword:
Purpose:

Opportunity Options

Opportunity Name:

Use default letter printing options

OK **Cancel**

3. Select the appropriate Letter Printing Option.
4. After the letter is printed, the printed letter is displayed in the Letter Log section.

Related Resources/Competition Tab

Opportunity - Christian Able - Annuity

Summary Detail (P) Activities Action History Letters/Documents Related Resources/Competition Custom

Related Resources		
<input type="checkbox"/> Role	User Name	Percentage (%)
<input type="checkbox"/> Primary Owner	Mark Paladian	100

Competitors

<input type="checkbox"/> Contact-Business Names	Product	Strength	Weakness
---	---------	----------	----------

Related Resources

The advisor who created the contact is the Primary Owner. Opportunities will be assigned to the Primary Owner and will be displayed only once in the Opportunity Summary. The Primary Owner field can also be seen in the Opportunity Detail tab. The Primary Owner can be changed by clicking the **Change Primary Owner** button on the Opportunity Detail tab.

Add a Related Resource

1. In the Related Resources section, click the **Add** button to open the Opportunity Resource dialog box.

SmartOffice

Opportunity Resource

User Name: Mark Paladian

Resource Role: Consultant

Description: Sales Consultant

OK Cancel

2. Click the **User Name** hyperlink to display the list of users.
3. Select the applicable User Name hyperlink.
4. Select the **Resource Role** from the drop-down list.

Note: If the user selects **Other Owner** in the Resource Role field, a Percentage (%) field displays for the user to enter the appropriate percentage. This feature should only be used if in case of a split opportunity between two or more advisor/agents.

5. Click the **OK** button to add the record to the Related Resources list.

Remarks

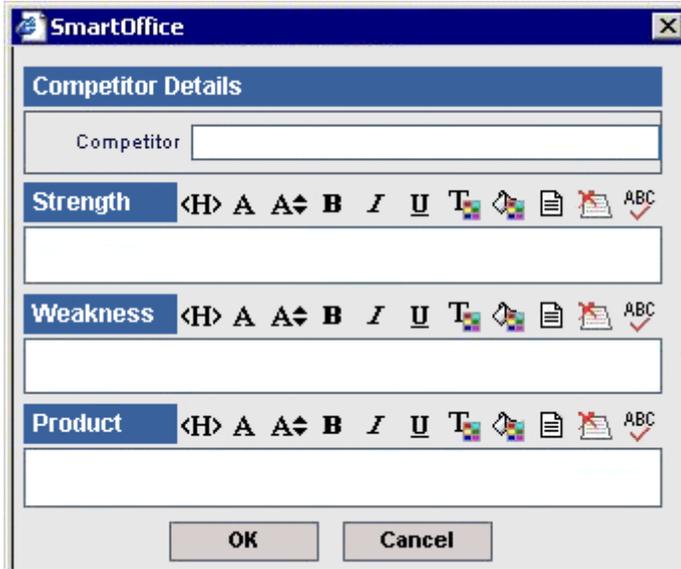
Remarks is a free form field that stores miscellaneous information about the opportunity. The maximum number of characters entered is 1024.

Competitors

This section displays the competitors that are vying for the opportunity.

Add Competitors

1. In the Competitors section, click the **Add** button to open the Competitor Details dialog box.



The image shows a 'Competitor Details' dialog box from the SmartOffice application. It features a title bar with the 'SmartOffice' logo and a close button. The main area is divided into several sections: a 'Competitor' text field at the top, followed by three sections labeled 'Strength', 'Weakness', and 'Product'. Each of these three sections has a rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and a checkmark. Below each toolbar is a large text area for entering details. The 'Product' section is currently selected and highlighted. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

2. Click the **Competitor** hyperlink to open the Search Business Contacts dialog box.
3. Click the **Search** button to open the Business Contact List dialog box.
4. Select the applicable Business Name hyperlink.
5. Enter the appropriate information in the Strength, Weakness, and Product sections. The maximum number of characters allowed is 255.
6. To save the competitor detail information, click the **OK** button.

Custom Tab

The Opportunity Custom tab is used to create custom fields. Click the **Customize Label** button to modify the fields.

Note: The Customize Label button is only accessible with the Office Setup role enabled.

Opportunity Dashboard

The Opportunity Dashboard serves as an analytical reporting tool for the SmartOpportunities module, displaying the different stages of completion for all Opportunities in the system.

Opportunity Dashboard

Report Selection Options				Opportunity Dashboard Options			
Reporting Period	<input type="text"/>	Opportunity Type	All	Status	All	<input checked="" type="checkbox"/> Forecast Report	<input checked="" type="checkbox"/> Show Forecasted Only
Campaign Name	<input type="text"/>	<input type="radio"/> Pipeline Report	<input type="checkbox"/> Include Inactive Opportunities	<input type="radio"/> Tree Control	<input type="radio"/> Summary	<input checked="" type="radio"/> Normal Spreadsheet	<input type="button" value="Refresh"/>
Office Name	Pasadena						
User Name	<input type="text"/>						
Filter	<input type="text"/>						

Opportunity Dashboard Summary								
<input type="checkbox"/>	Contact Name	Est. Close	Est. Revenue	Potential Revenue	Last Activity Outcome	Current Stage	Primary Owner	Days Since Last Stage
Est. Close - July 2005								
<input type="checkbox"/>	McNelson, Richard	07/05/2005	9,375	12,500	Activity Created	5 - Issued	Phillip Anderson	35
<input type="checkbox"/>	Fernandes, Novelyn	07/05/2005	2,012	5,750	Activity Created	3 - Awaiting Approval	Phillip Anderson	35
<input type="checkbox"/>	Flores, Miguel	07/25/2005	4,875	6,500	Activity Created	5 - Issued	Norma Peterson	35
<input type="checkbox"/>	Badinas, Andrea M	07/25/2005	125	500	Call Back	2 - Fact Finding	Mark Paladian	35
Subtotal: Est. Close - July 2005 (4)			16,387	25,250				
Est. Close - August 2005								
<input type="checkbox"/>	Martin, Melanie	08/08/2005	9,375	12,500	Activity Created	5 - Issued	Phillip Anderson	35
<input type="checkbox"/>	Simmons, Patrick	08/08/2005	1,137	1,750	Letter Sent	4 - Approved	Norma Peterson	35
<input type="checkbox"/>	Baker, Robert	08/08/2005	37	750	Appointment Made	1 - Initial	Phillip Anderson	35
<input type="checkbox"/>	Able, Christian Adam	08/22/2005	3,575	5,500	Letter Sent	4 - Approved	Mark Paladian	35

- **Report Selection Options** – These options customize Dashboard Reporting for a specific reporting period, campaign, office, and user.
- **Opportunity Dashboard Options** – These Opportunity-based parameters enable the user to define the kind of Opportunities that are to be displayed.
- **Opportunity Type** – Select a value on this drop-down list to view a single type of Opportunity.
- **Status** – The Opportunity Stage determines Status. Select a Status to see Opportunities that have the selected Status.
- **Forecast Report** – Offers a view of Opportunities along with the time frame in which they are expected to close.
- **Show Forecasted Only** – Check this option to view only those Opportunities that have the Include in Forecast option (in the Opportunity Detail) selected.
- **Pipeline Report** – Displays the sales channel to determine how close the Opportunities are to the Estimated Revenue.
- **Include Inactive Opportunities** – Check this option to display Opportunities that are in a Stage with an Inactive Status.
- **Display Tree Control** – When sorting by more than one column is required, enable this control to view records at multiple levels.
- **Summary** – This view will display the Tree Control in a Summary view.
- **Normal Spreadsheet** – Spreadsheet view of the data.

Opportunity Interface with other Modules

Individual Contact Record

The Opportunities tab is used to review the Opportunities associated with the contact. From the Individual Contact Summary list, tag a contact record and then click the **Opportunities** tab.

Joseph M. Ackerman (Joe) (Spouse: Katie)

<input type="checkbox"/>	Current Stage Date	Primary Owner	Opportunity Name	Potential Revenue	Est. Revenue
<input type="checkbox"/>	06/06/2005	Phillip Anderson	Term Life 7	1,250	187
<input type="checkbox"/>	06/06/2005	Phillip Anderson	Cross Sell - Disability	3,600	1,260
Total				4,850	1,447

Super Add

When a contact is added with the Super Add function, click the **Add Opportunity** button to create an Opportunity.

Business Contact Record

The Opportunities tab is used to review the Opportunities associated with the business. From the Business Contact Summary list, tag a business record and then click the **Opportunities** tab.

Acme Corporation

<input type="checkbox"/>	Current Stage Date	Primary Owner	Opportunity Name	Potential Revenue	Est. Revenue
<input type="checkbox"/>	06/06/2005	Phillip Anderson	Financial / Estate Planning	12,000	3,000
Total				12,000	3,000

Household Record

The Opportunities tab is used to display all records that are connected to the Household through Opportunities. From an open Household record, click the **Opportunities** tab.

Current Stage Date	Opportunity Name	Contact Name	Campaign	Potential Revenue	Est. Revenue	Est. Close
06/06/2005	Cross-Sell Annuity	Adams, Margaret	Cross Sell - Annuity	2,500	375	08/29/2005
Total				2,500	375	

Marketing Campaign

1. Select **Marketing Campaign** from the expanded **Reporting/Marketing** menu to open the Campaign Search dialog box.
2. Click the **Search** button to display the Marketing Campaign Summary.
3. Select a record and then click the **Opportunities** tab to display the opportunities that are connected to the Marketing Campaign.

Current Stage Date	Contact Name	Opportunity Name	Primary Owner	Potential Revenue	Est. Revenue
01/10/2006	Smith, Mark	College Education Funding	Chris Bartlett	1,500	225
12/08/2005	Abernathy, Brad	College Education Funding	Mark Paladian	0	0
Total				1,500	225

Records Shown: 2 Total Records: 2

Marketing Campaign Detail Tab

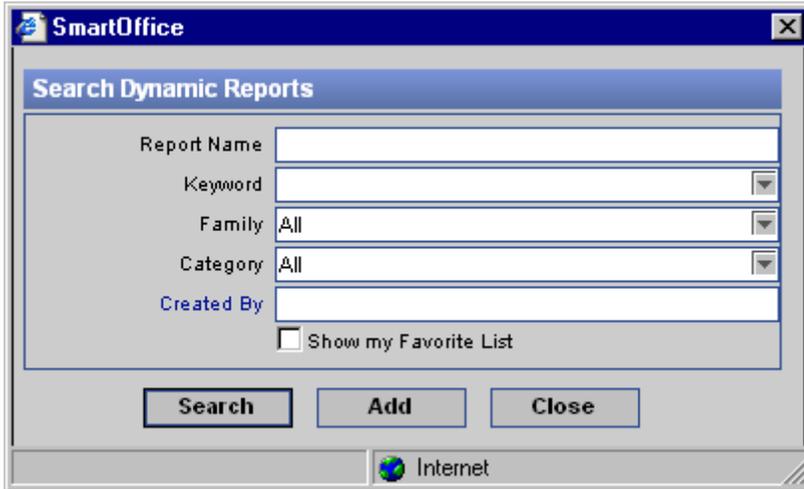
The Opportunity Type field displays on the Marketing Campaign Detail tab. This enables the following features:

- If the Lead is accepted with a Marketing Campaign and the Opportunity Type is defined in the Campaign, the Opportunity that is created will be associated with the Opportunity type of the Campaign.
- If the Lead is accepted with a Marketing Campaign and the Opportunity Type is not defined in the Campaign, the Opportunity that is created will be associated with the default Opportunity Type defined in the Opportunity Setup.
- If the selected set is associated with the Marketing Campaign with the Opportunity Type defined, the Opportunity that is created will have the Opportunity Type of the Marketing Campaign.
- If the selected set is associated with the Marketing Campaign without the Opportunity Type defined, the Opportunity that is created will have the Opportunity Type defined in the Opportunity Setup.

Marketing Campaign Dynamic Reports

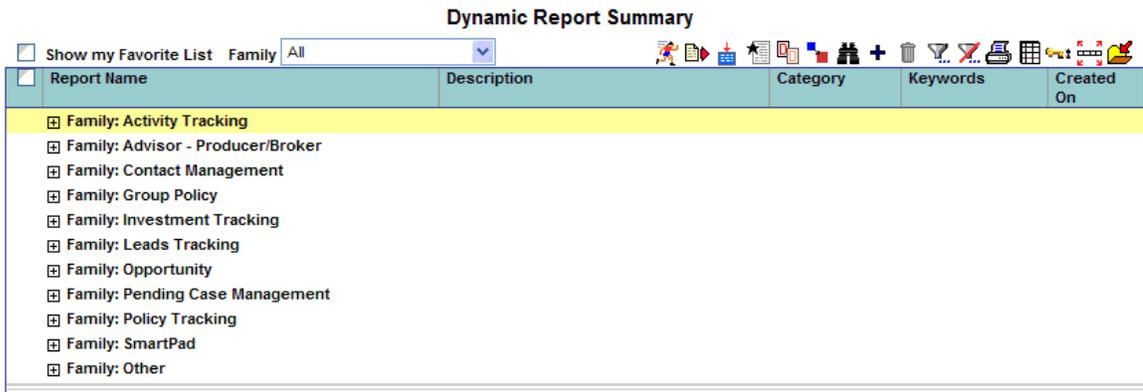
As part of a marketing campaign, users can use Dynamic Reports to publish contact names.

1. To start, define the applicable sets or filters to be used in the report. Refer to the SmartOffice Online Help for more information on configuring sets and filters.
2. Select **Dynamic Reports** from the expanded **Reporting/Marketing** menu to open the Search Dynamic Reports dialog box.



The screenshot shows a dialog box titled "SmartOffice" with a sub-header "Search Dynamic Reports". It contains several input fields: "Report Name" (text box), "Keyword" (text box with a dropdown arrow), "Family" (dropdown menu with "All" selected), "Category" (dropdown menu with "All" selected), and "Created By" (text box). Below these fields is a checkbox labeled "Show my Favorite List". At the bottom of the dialog are three buttons: "Search", "Add", and "Close". The status bar at the bottom indicates "Internet".

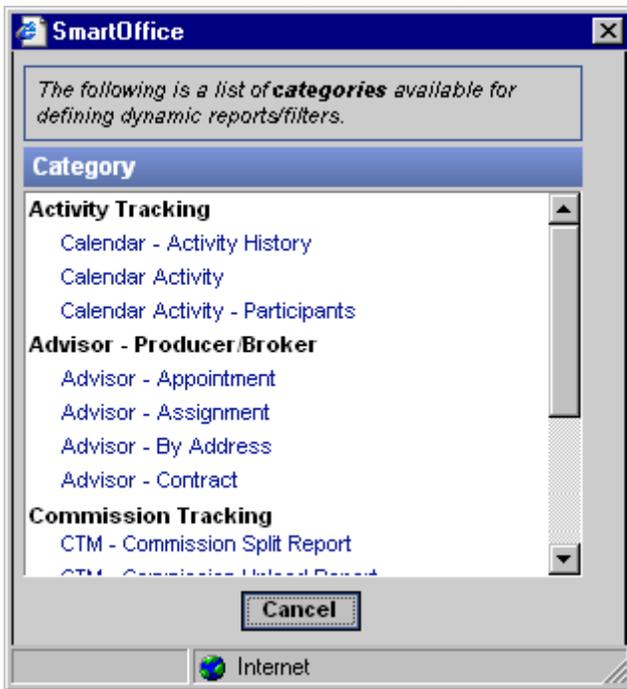
3. Click the **Search** button to display the Dynamic Report Summary.



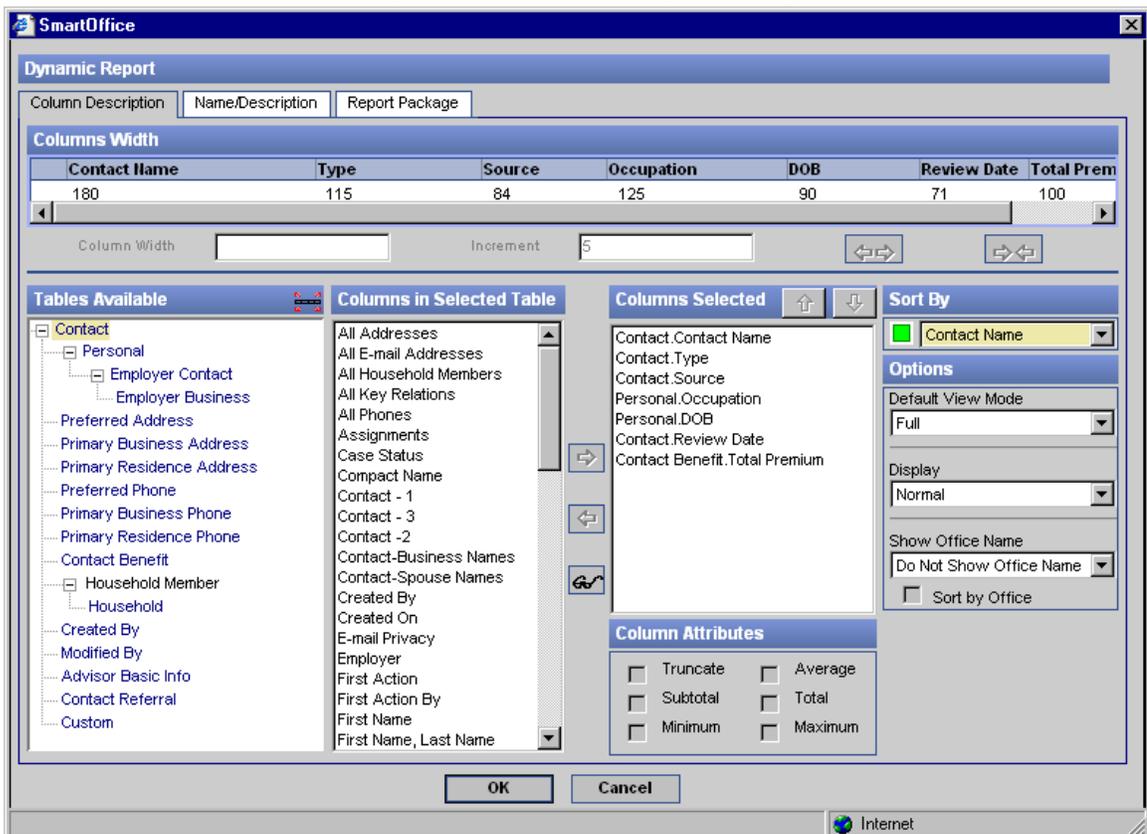
The screenshot shows a window titled "Dynamic Report Summary". At the top, there is a checkbox "Show my Favorite List" and a dropdown menu for "Family" set to "All". To the right are several icons for actions like print, refresh, and search. Below this is a table with the following columns: "Report Name", "Description", "Category", "Keywords", and "Created On". The table contains a list of report families, each with a small icon to its left.

Report Name	Description	Category	Keywords	Created On
<input type="checkbox"/> Family: Activity Tracking				
<input type="checkbox"/> Family: Advisor - Producer/Broker				
<input type="checkbox"/> Family: Contact Management				
<input type="checkbox"/> Family: Group Policy				
<input type="checkbox"/> Family: Investment Tracking				
<input type="checkbox"/> Family: Leads Tracking				
<input type="checkbox"/> Family: Opportunity				
<input type="checkbox"/> Family: Pending Case Management				
<input type="checkbox"/> Family: Policy Tracking				
<input type="checkbox"/> Family: SmartPad				
<input type="checkbox"/> Family: Other				

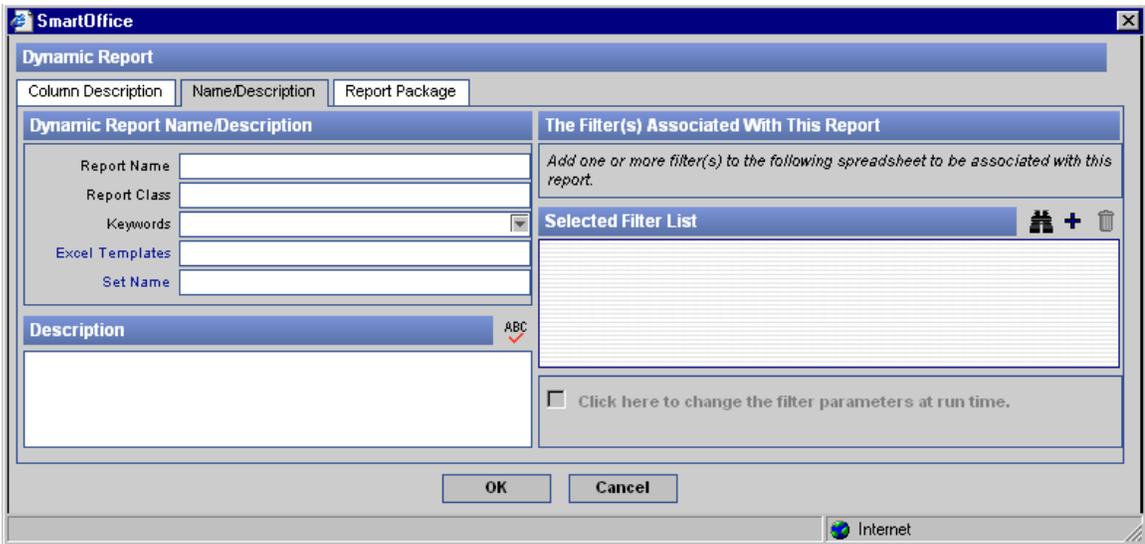
- Click the **Add** button to open the Category dialog box.



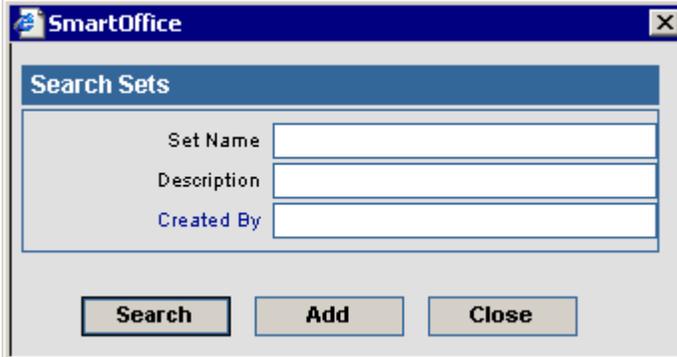
- Select **Contact – Individual** to open the Column Description dialog box.



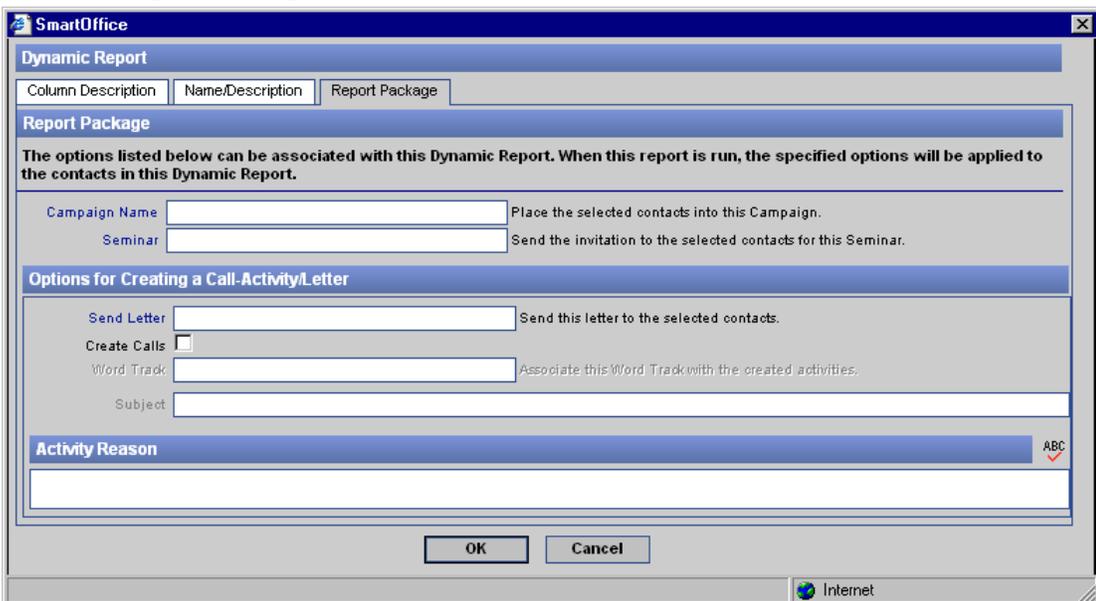
6. Click the **Name/Description** tab.



7. Click the **Set Name** hyperlink to open the Search Sets dialog box.



8. Enter the Set Name or Description and then click the **Search** button to enter the information into the Set Name field.
9. Click the **Report Package** tab.



10. Click the **Campaign Name** hyperlink to open the Search Campaign dialog box.
11. Click the **Search** button to display the Marketing Campaign list.
12. Click the appropriate Campaign Name hyperlink to insert the information into the Campaign Name field.
13. Enter the remaining information and then click the **OK** button.

Seminar Dynamic Reports

1. From the side menu, click **Marketing** and then select **Dynamic Reports** from the expanded menu to open the Search Dynamic Reports dialog box.
2. Click the **Search** button to display the Dynamic Report Summary list.
3. Select the appropriate dynamic report and then click the **Execute Packaged Option** button.

Leads Tracking

When the assigned Advisor logs into the system, an Alert is displayed.

1. Click the **OK** button to display the list of new Leads.
2. To accept the Leads, tag the records and then click the **Accept** button to display the List of Users dialog box.
3. Select the user that will be assigned to the current Leads and then click the **OK** button to open the Select Action for Accepted Leads dialog box.
4. Select the **Create Initial Call** option, enter a reason for the call, and then click the **OK** button to open the Create Calendar Activities dialog box.
5. Enter the appropriate activity information and then click the **OK** button to process the request.
6. In the Leads Acceptance dialog box, click the **Close** button.
7. To display the newly accepted Leads, click **Reporting/Marketing** and then select **Marketing Campaign** from the expanded menu to open the Search Campaign dialog box.
8. Type in the Campaign Name and then click the **Search** button to open the Marketing Campaign Summary list.
9. Tag the applicable Campaign record and then click the **Leads** tab.
10. Click the **Opportunities** tab to display the campaign's Opportunity information.
11. Select an Opportunity and then click the Opportunity Summary **Detail** tab.
12. Modify the information as necessary.

Add Marketing Campaign to Existing Leads

1. From the side menu, click **Leads Tracking** and then select **Leads Search** from the expanded menu to open the Search Advisor Office Leads dialog box.
2. Click the **Search** button in the Leads Search Options (Individual/Business/Advisor) dialog box to display the Leads Summary list.
3. Tag a record and then click the **Detail** tab.
4. In the Campaign Information section, delete the current Campaign name.
5. Click the **Campaign** hyperlink to open the Search Campaign dialog box.
6. Click the **Search** button to display the Marketing Campaign list.
7. Select the appropriate Campaign Name hyperlink and then click the **Save** button.

Seminar Tracking Module

After the contact attends an event, the Schedule Appointment and Schedule Call for an Appointment options create a follow-up activity and prompts the opening of the Activity Detail Information dialog box.

To track contacts in a sales pipeline, select the appropriate Opportunity from the corresponding drop-down list.

The Appointment Requested option adds the contact to the Leads table. If the contact does not have a primary advisor, the contact will be assigned to the Leads Coordinator for distribution.