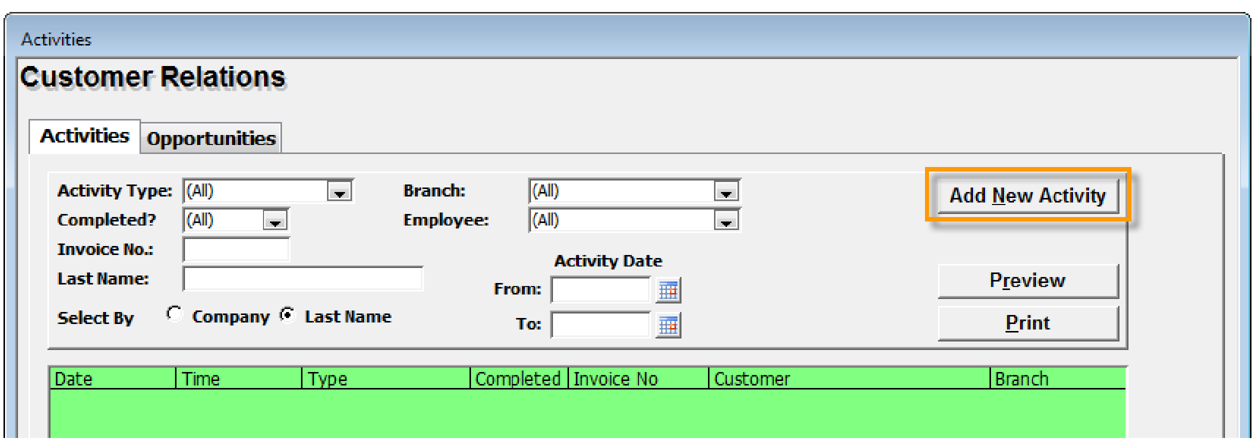
Activities and Opportunities

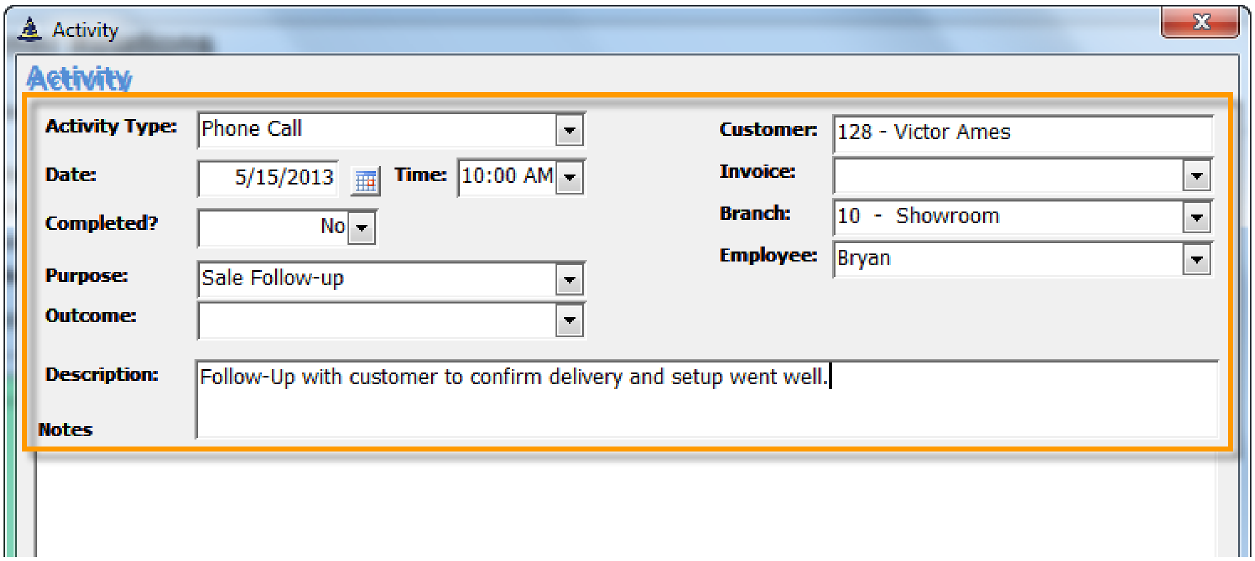
Activities and Opportunities are intended to help sales-staff organize and remind them of follow-ups and appointments needed to improve customer satisfaction and increase sales. There are several different ways to create and/or view activities and opportunities; the first way is from the Main Menu of Furniture Wizard; once Furniture Wizard is open select Activities & Opportunities.

Creating a New Activity

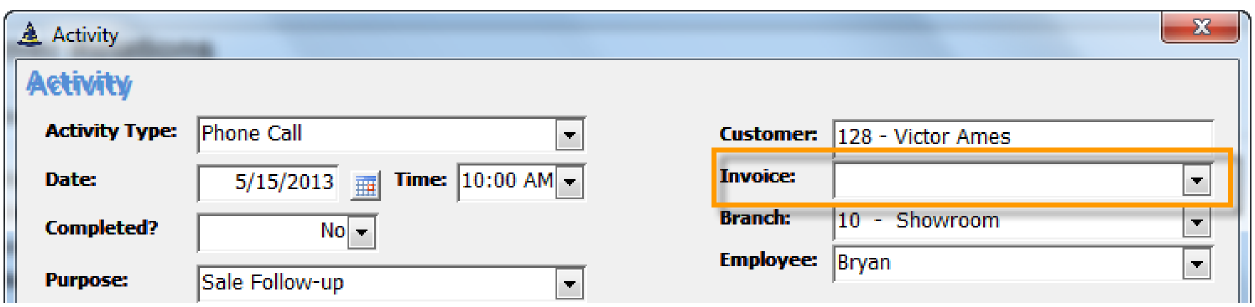
To create a new activity single click the Add New Activity Button or use the keyboard shortcut ALT + N.



After clicking upon the Add New Activity Button, the Activity Form appears – this is where the activity is actually created. In the Activity Form fill in all fields that are desired to remind the salesperson the reason for the activity. At a minimum the Activity Type, Date, and Customer fields need to be filled in.

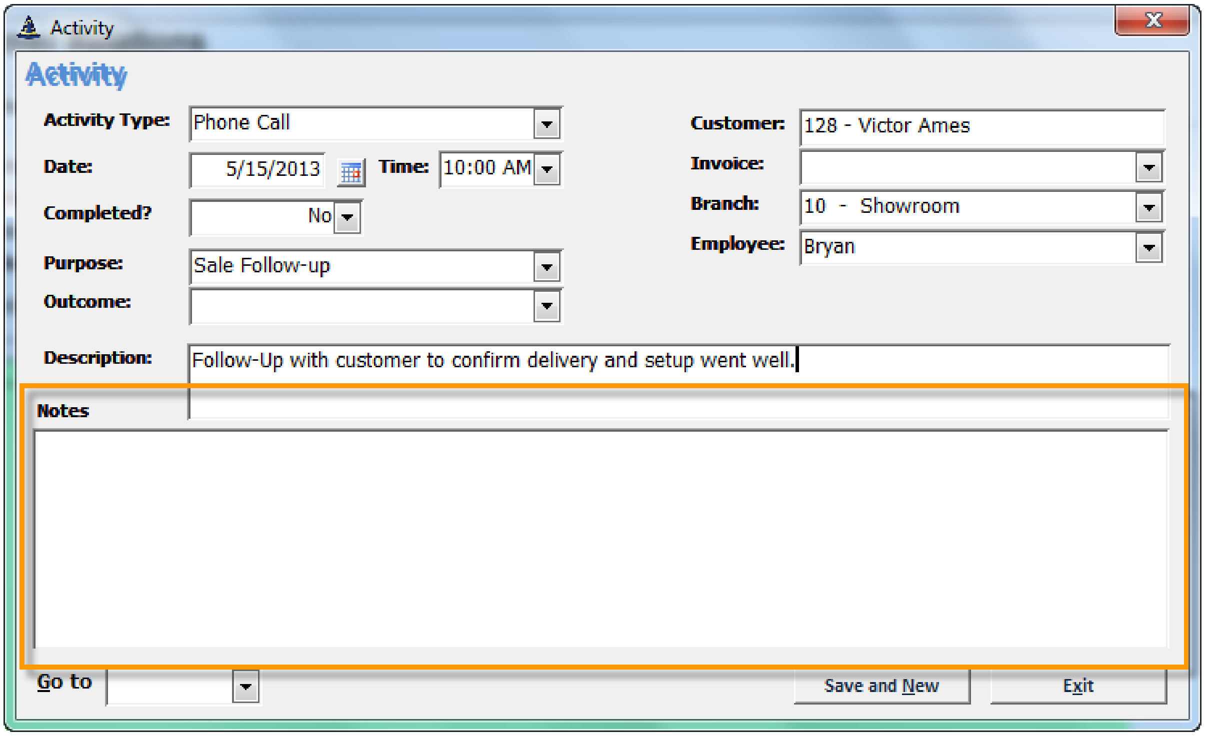


**Note: creating an activity through the Activities & Opportunities in the Main Menu of Furniture Wizard will NOT allow you to assign an invoice to the activity. To assign an invoice to an activity it must be done through the invoice (which will be discussed later in this document).



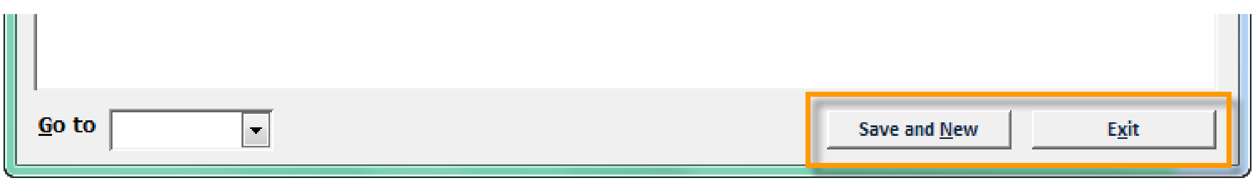
Keeping Notes on the Activity

All attempts to contact the customer and/or any contact with the customer on the assigned activity should be noted under the notes section in the activity.



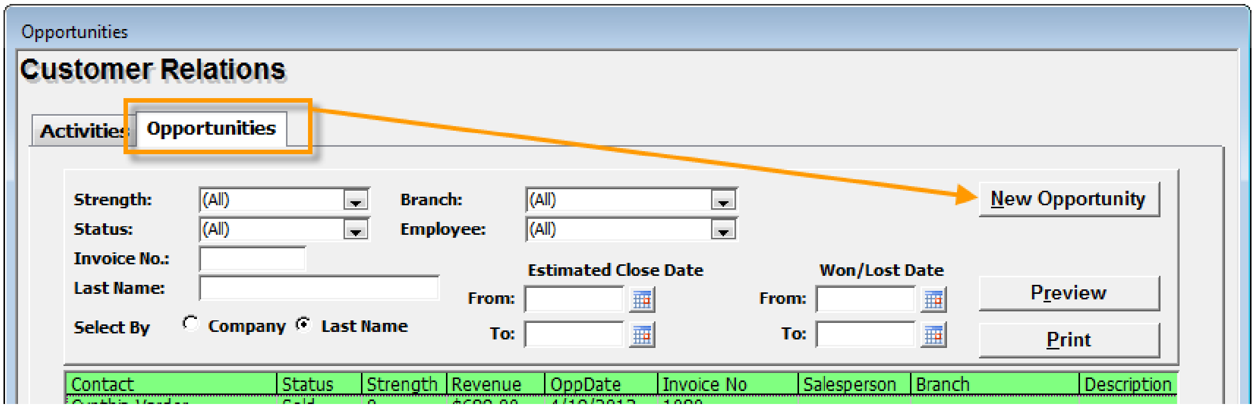
Saving and Exiting an Activity

After all information is entered into the Activity the activity may be saved and a new one entered by selecting the Save and New Button or listing the keyboard shortcut ALT + N. If another activity does not need entered simply click the Exit Button or use the keyboard shortcut ALT + X; the activity will automatically save.

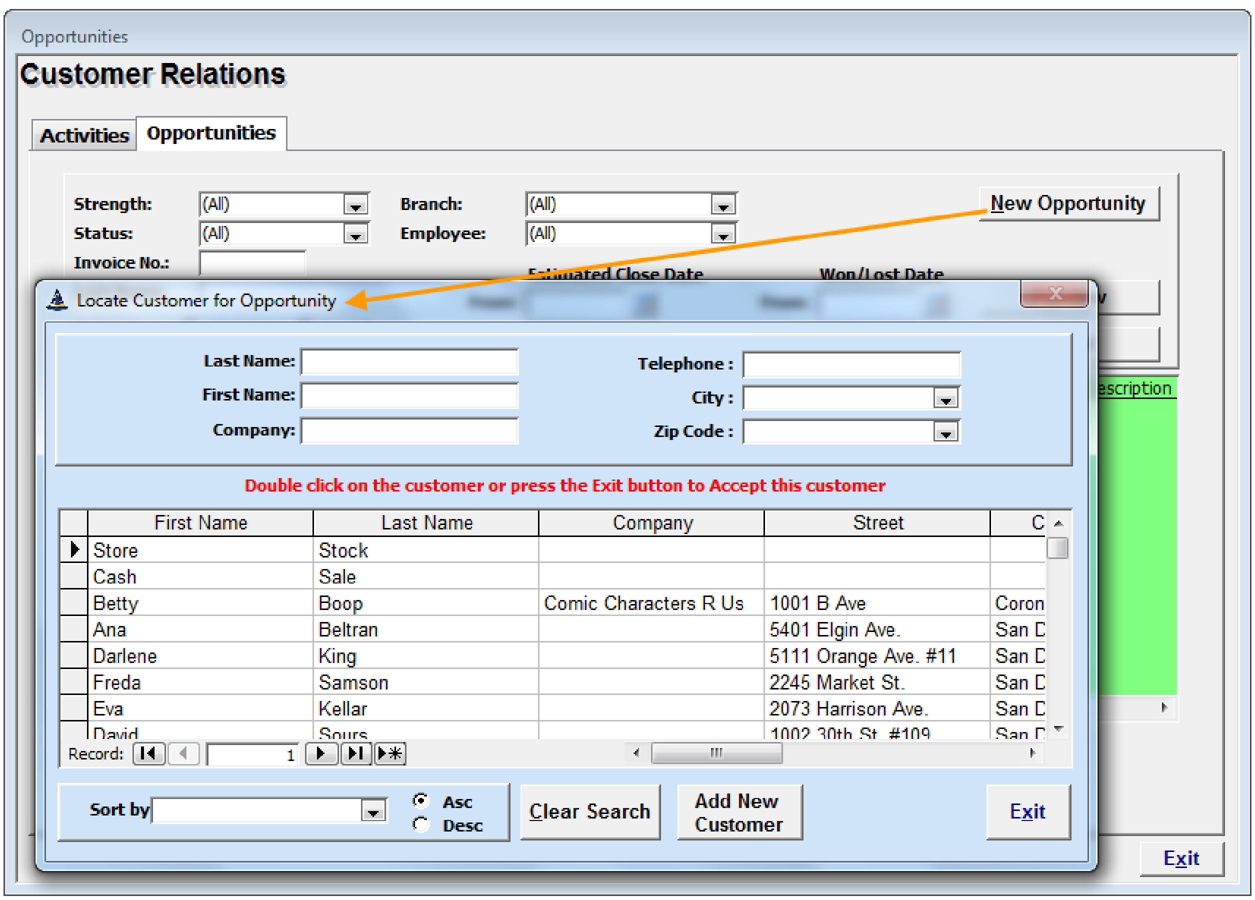


Creating a New Opportunity

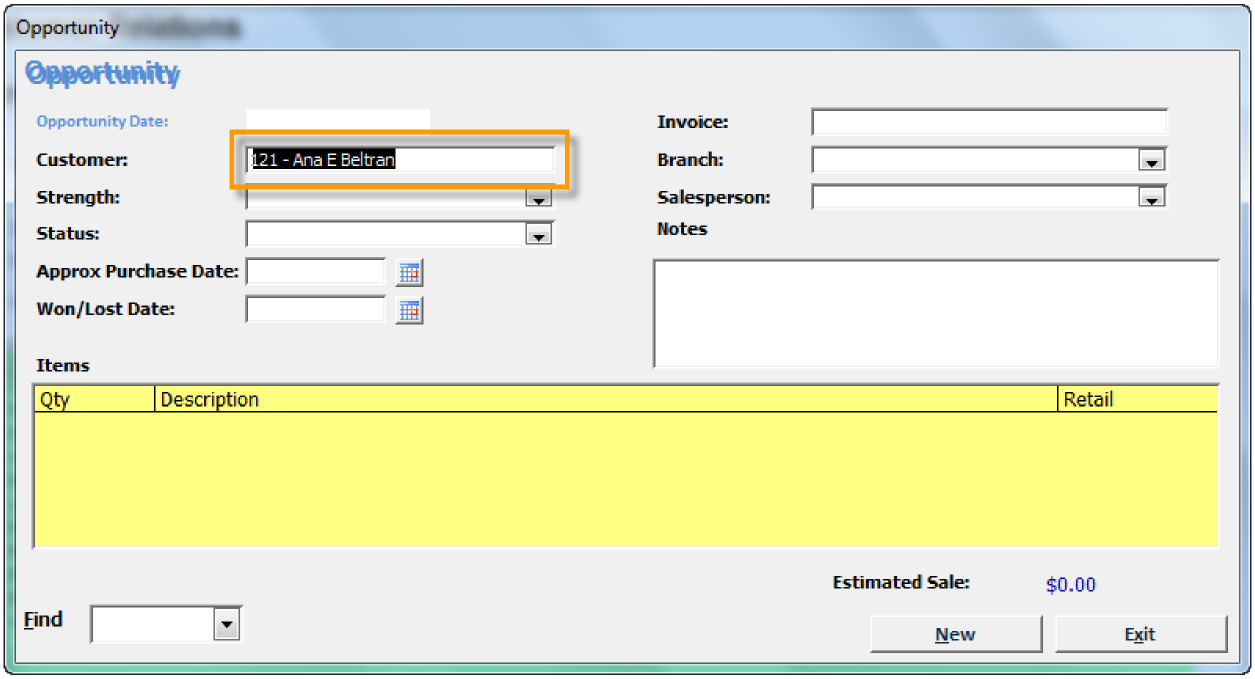
Opportunities are for customers who have not made a purchase but may be a great potential for a sale. To create a new opportunity click the Opportunity Tab then click the New Opportunity Button or use the keyboard shortcut ALT + N.



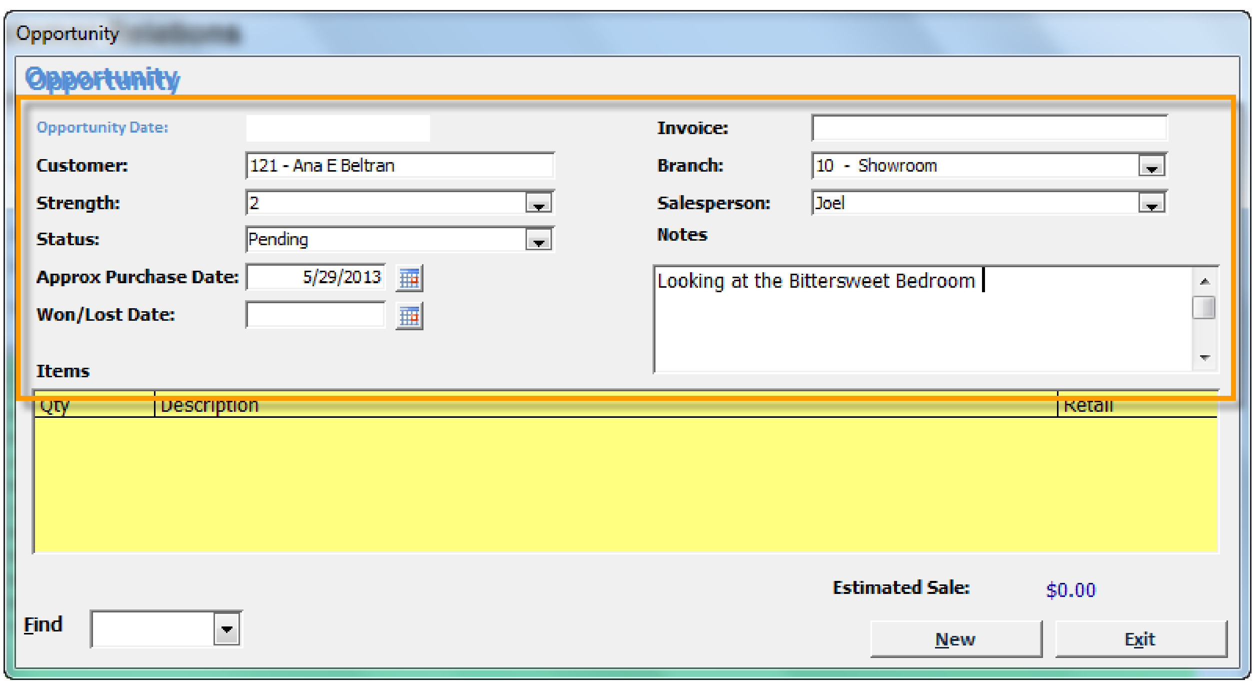
After clicking upon the New Opportunity Button, Furniture Wizard's list of customers appears. Select the customer that the opportunity is being created for by double clicking on the customer or add a new customer.



After selecting the customer the Opportunity Form appears; this is where the opportunity is actually created. (Notice the customer's name is already filled in).

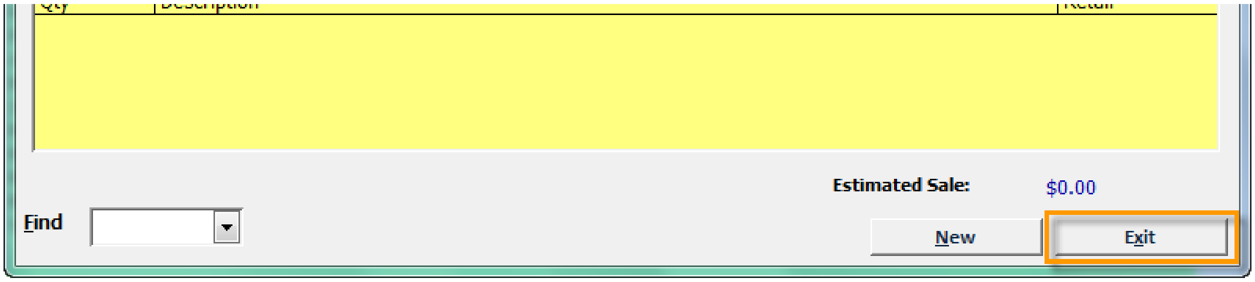


Fill in all applicable fields on the opportunity. Note: items (the yellow field box) will not be filled in unless the opportunity has been imported from a postponed order on the iPad.



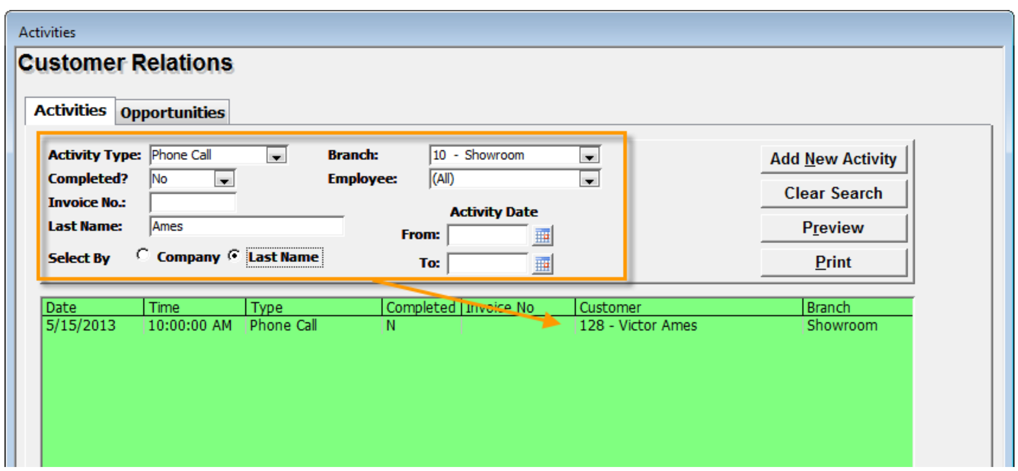
Exiting the Opportunity Form

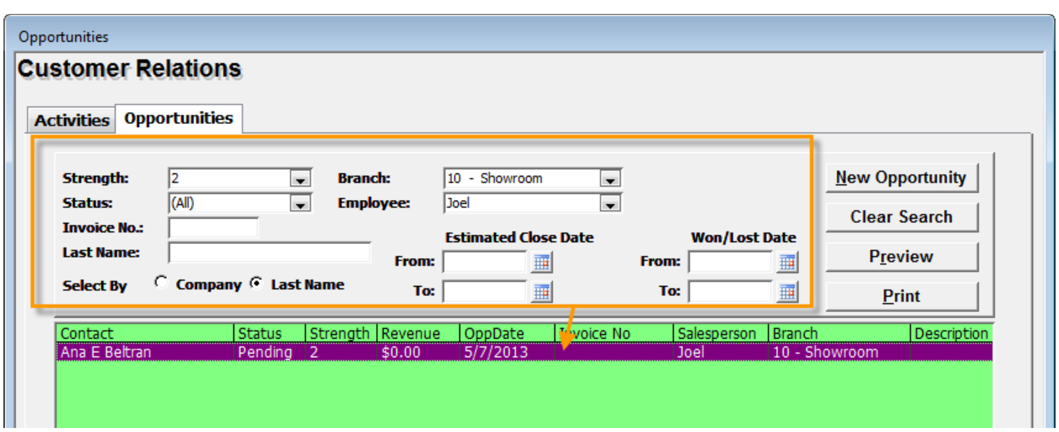
To save the opportunity, simply select the Exit Button or use the keyboard shortcut ALT + X and all information will be saved.



Searching for Activities and Opportunities

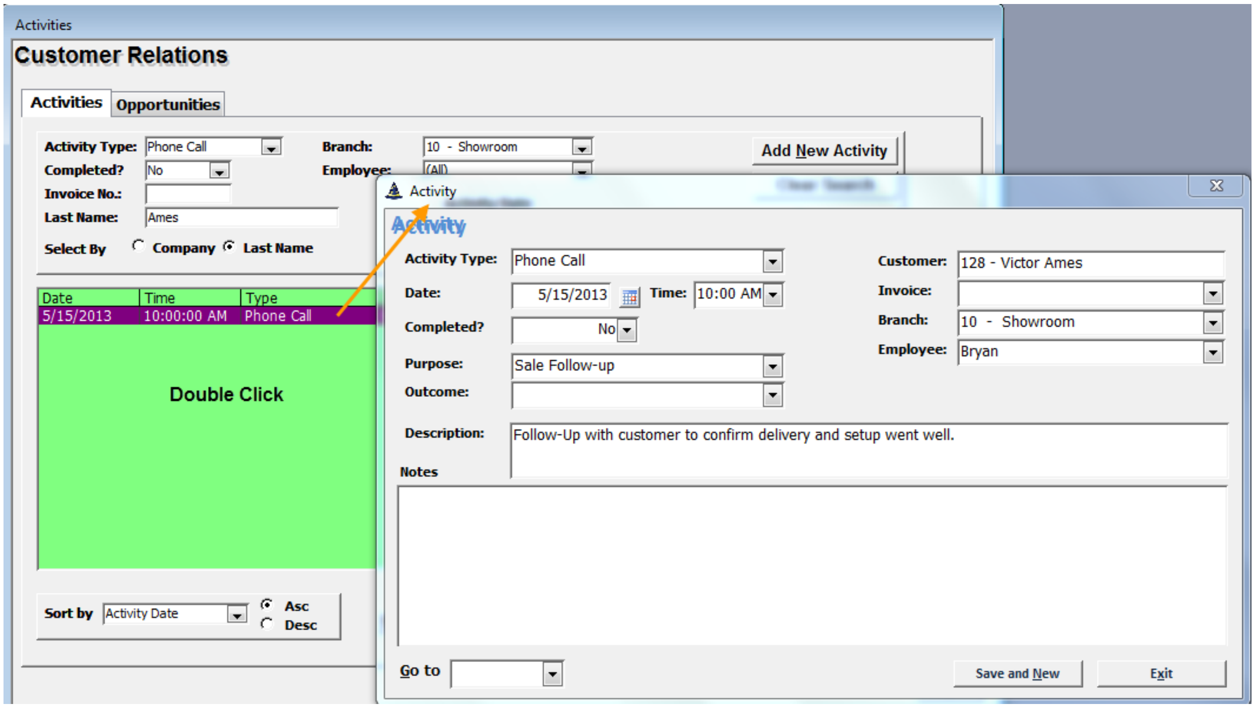
Both activities and opportunities may be searched to make finding a particular activity or opportunity simpler. Select either the Activities or Opportunities Tab and use the white search field to find the desired activity or opportunity.





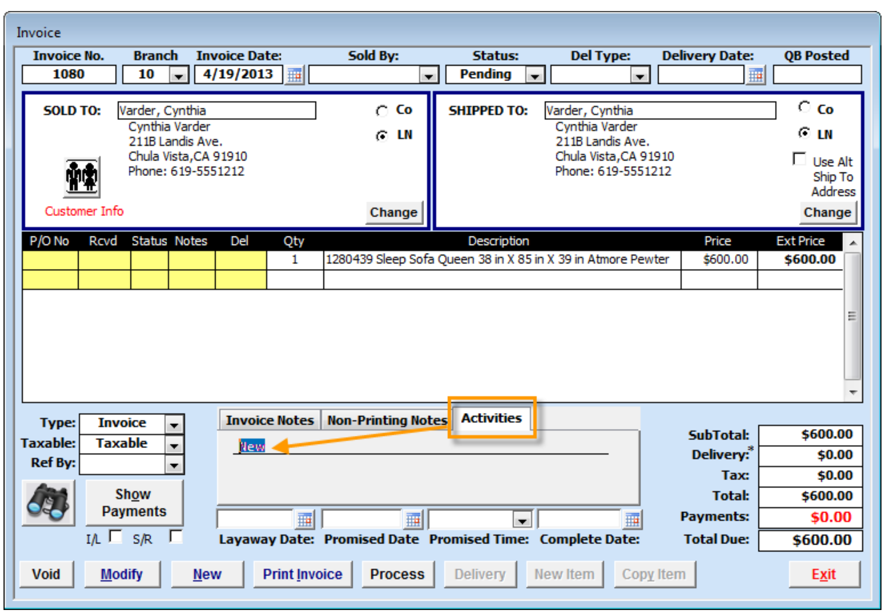
Opening an Activity or Opportunity

Once the Activity or Opportunity is found, adjustments or notes may be made by double clicking on the activity or opportunity to open it.

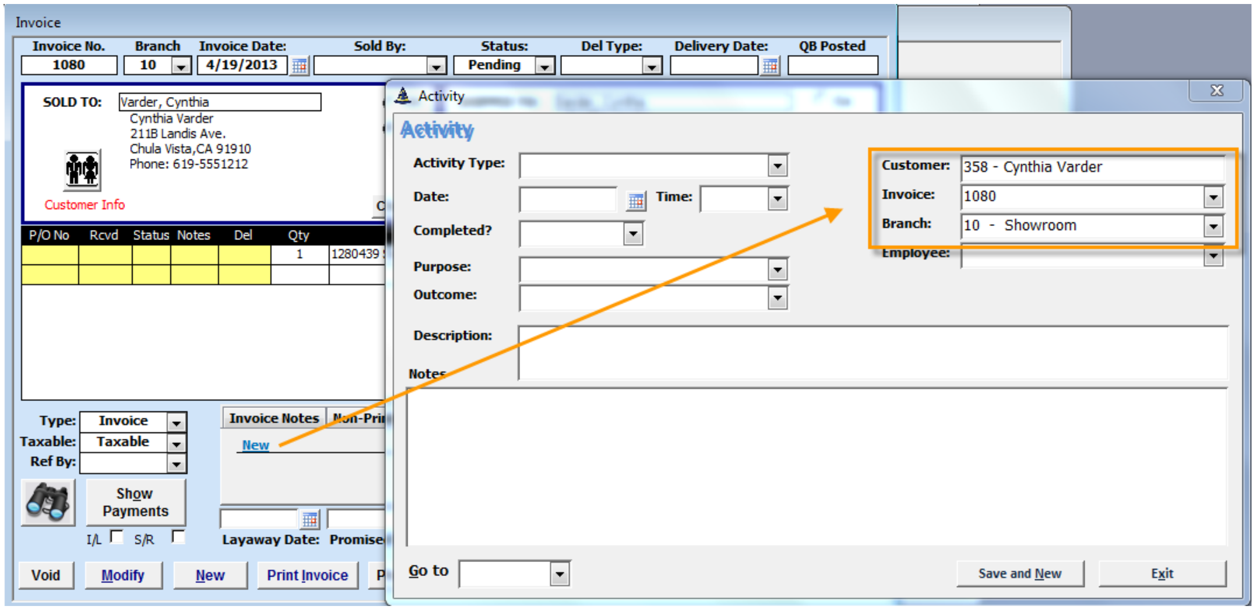


Creating an Activity from an Invoice

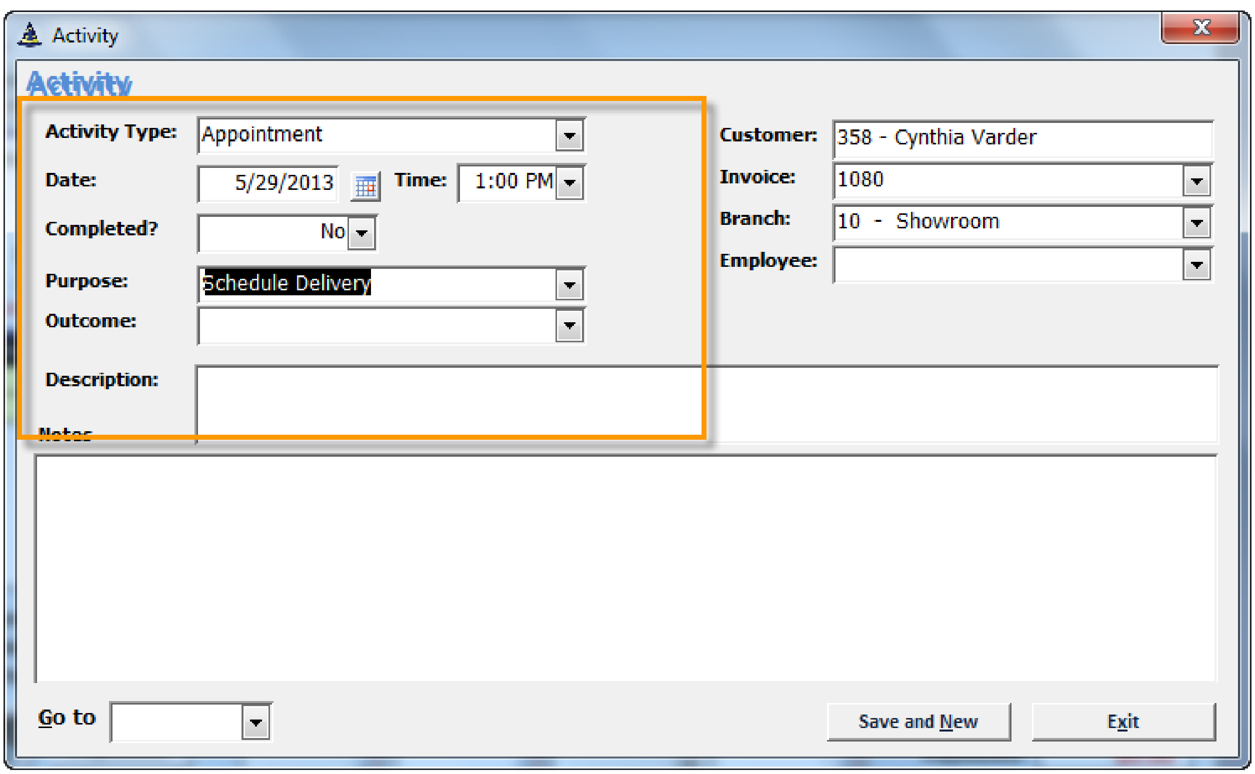
Activities may also be created through an invoice. To create an activity through an invoice, select the Activities Tab on the Invoice and click NEW.



After clicking New, the activity is automatically created for the customer, and is related to the invoice and branch.

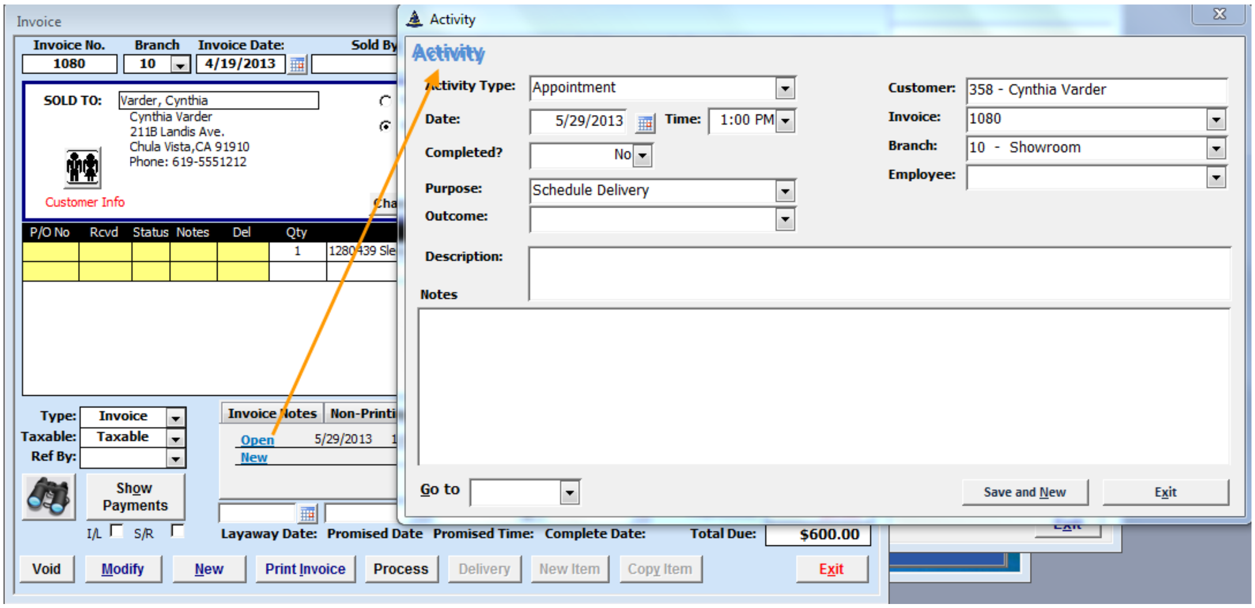


At a minimum, the Activity Type Field and Date Field must be entered. However, the more descriptive the activity the better.



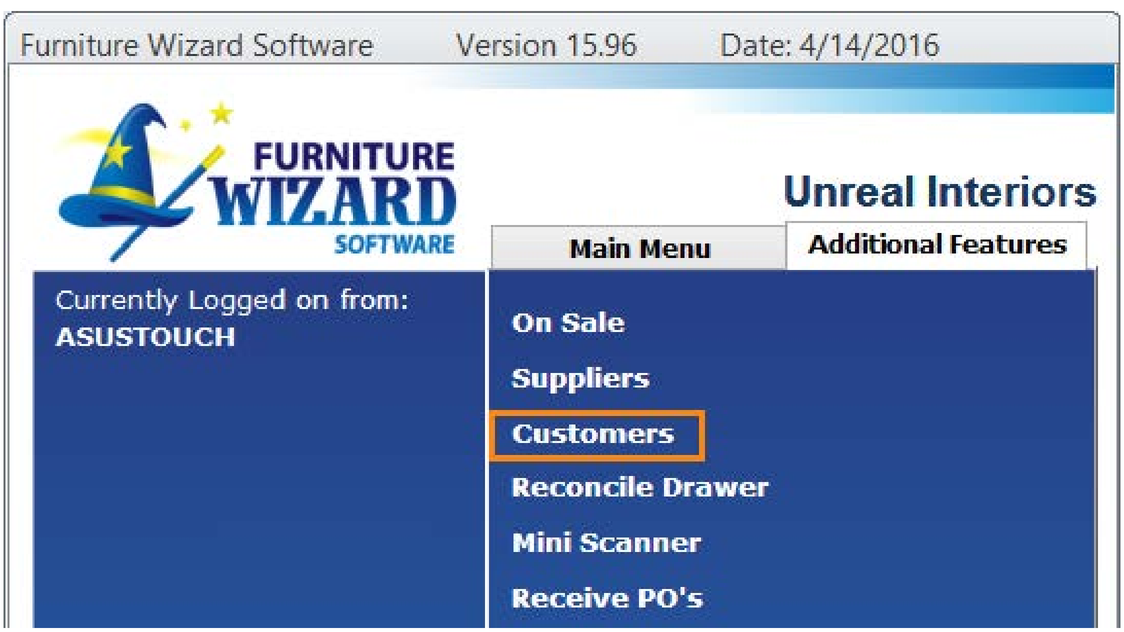
Opening an Activity from an Invoice

An activity may also be opened from an invoice. Search for the Invoice the activity is related to and select the Activities Tab in the Invoice. Then find the desired activity (if there are more than one) and select open; changes may now be made to the activity.

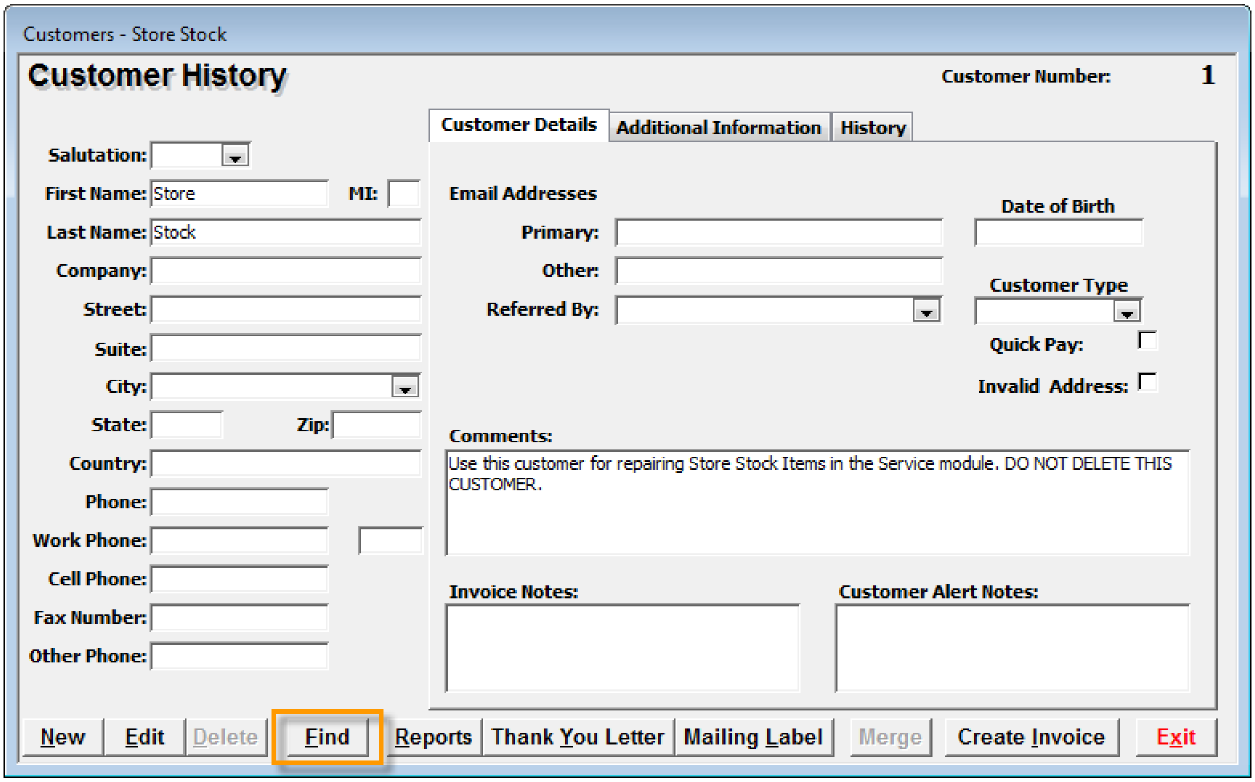


Finding an Activity or Opportunity through the Customer Form

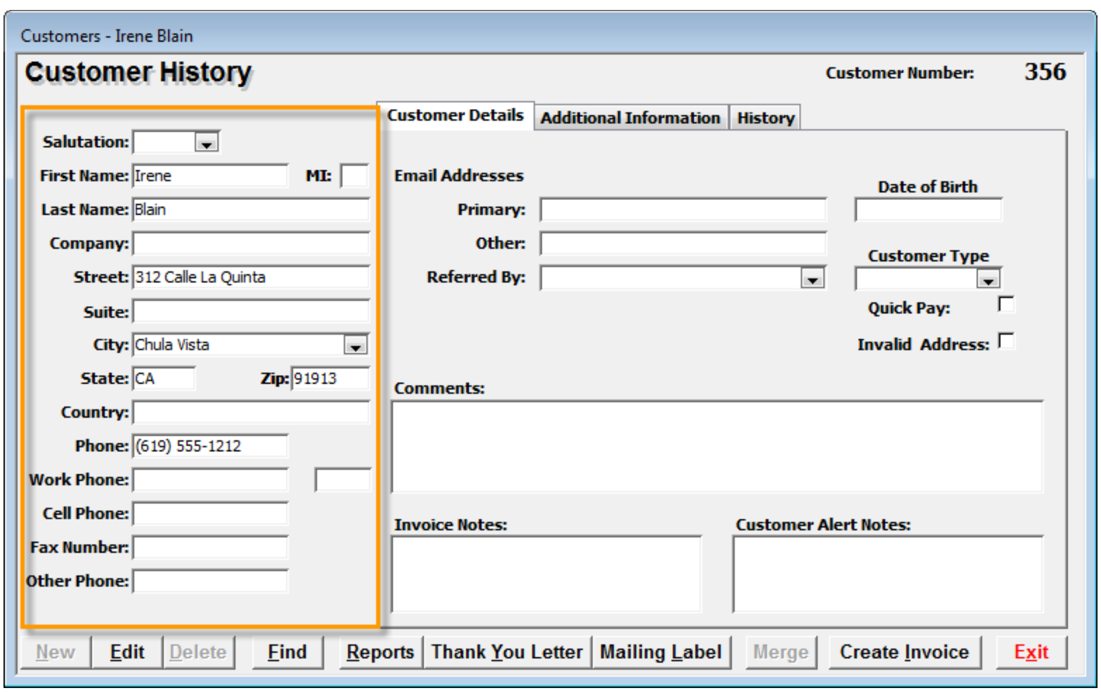
Activities and Opportunities may also be found and edited through the Customers Form. To find an Activity or Opportunity click on the Customers on the Main Menu in Furniture Wizard.



Once in the Customers Form click the Find Button or use the keyboard shortcut ALT + F to find the desired customer.



When the customer is found double click on their name so the customer appears on the customer form.



To see all activities or opportunities assigned to the selected customer, select the History Tab and select wither the Activities or Opportunities Button. Then find the desired Activity or Opportunity and double click to open. Again, the Activity or Opportunity may be edited.