

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.

Activities

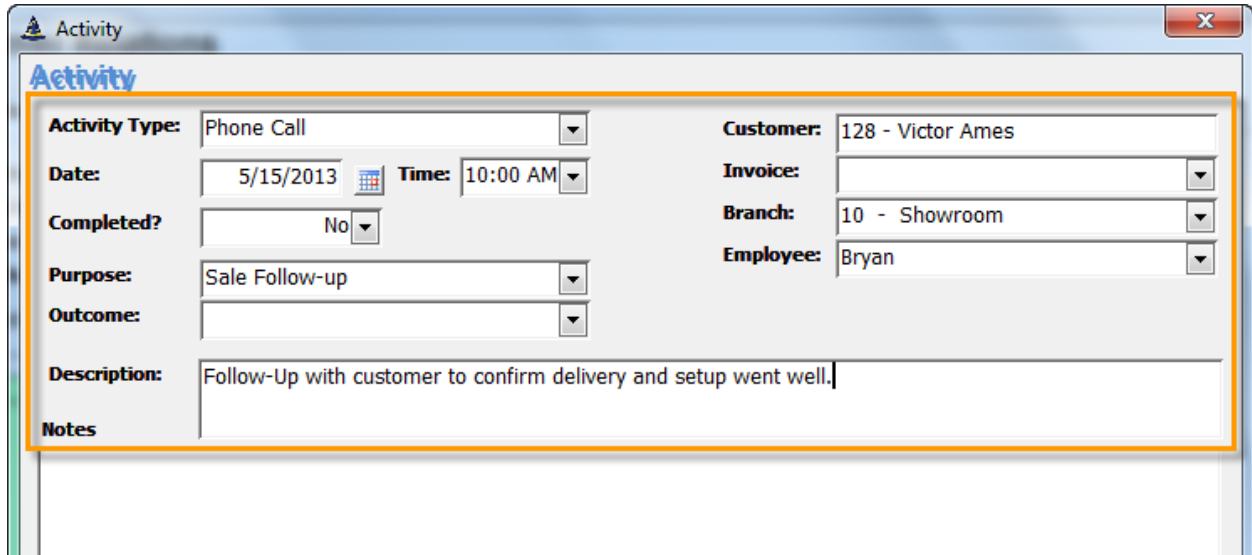
Customer Relations

Activities Opportunities

Activity Type: (All) Branch: (All)
Completed?: (All) Employee: (All)
Invoice No.:
Last Name:
Activity Date
From: To:
Select By Company Last Name
Add New Activity
Preview
Print

Date	Time	Type	Completed	Invoice No	Customer	Branch
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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.

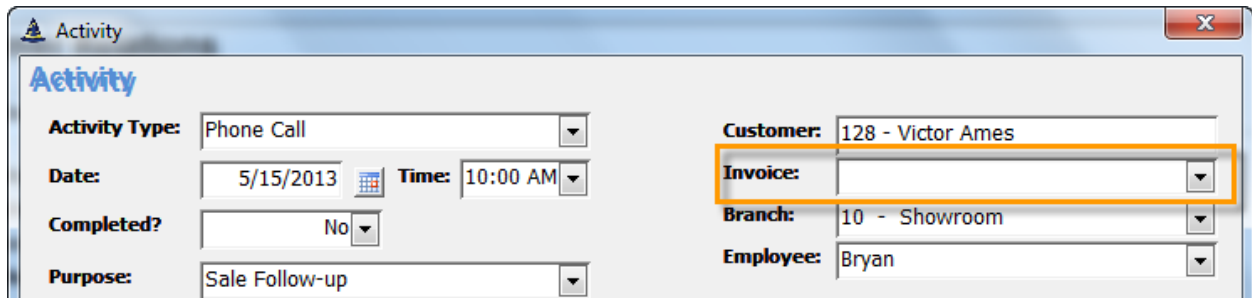


The screenshot shows a software window titled "Activity" with a close button in the top right corner. The window contains a form with the following fields:

Activity Type:	Phone Call	Customer:	128 - Victor Ames
Date:	5/15/2013	Time:	10:00 AM
Completed?	No	Invoice:	
Purpose:	Sale Follow-up	Branch:	10 - Showroom
Outcome:		Employee:	Bryan
Description:	Follow-Up with customer to confirm delivery and setup went well.		
Notes			

The main input area of the form is highlighted with a yellow border.

**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).

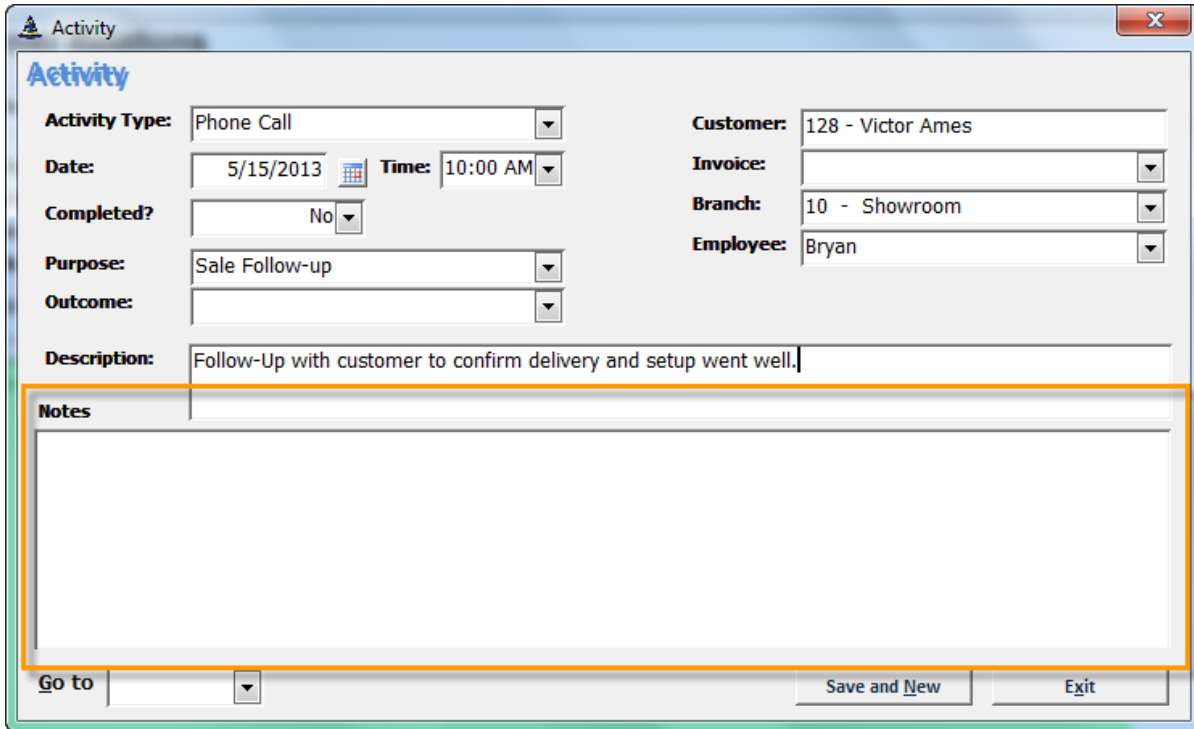


This screenshot shows the same "Activity" form as above, but with a yellow border highlighting the "Invoice" field, which is currently empty. The other fields remain the same:

Activity Type:	Phone Call	Customer:	128 - Victor Ames
Date:	5/15/2013	Time:	10:00 AM
Completed?	No	Invoice:	
Purpose:	Sale Follow-up	Branch:	10 - Showroom
Employee:	Bryan		

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.



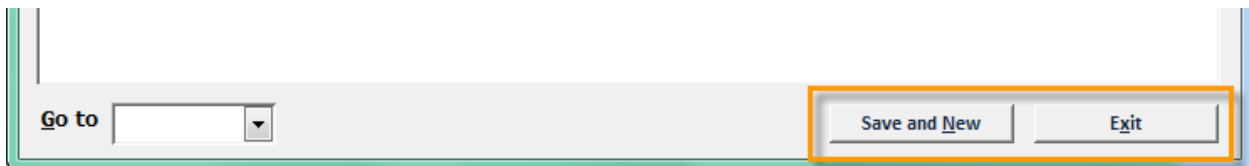
The screenshot shows a window titled "Activity" with a close button (X) in the top right corner. The window contains the following fields:

- Activity Type:** Phone Call
- Date:** 5/15/2013
- Time:** 10:00 AM
- Completed?:** No
- Purpose:** Sale Follow-up
- Outcome:**
- Description:** Follow-Up with customer to confirm delivery and setup went well.
- Customer:** 128 - Victor Ames
- Invoice:**
- Branch:** 10 - Showroom
- Employee:** Bryan

The **Notes** section is a large empty text area, highlighted with an orange border. At the bottom of the window, there is a "Go to" dropdown menu, a "Save and New" button, and an "Exit" button.

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.



This close-up screenshot shows the bottom of the window. On the left is a "Go to" dropdown menu. On the right are two buttons: "Save and New" and "Exit". Both buttons are highlighted with an orange border.

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.

Opportunities

Customer Relations

Activities: **Opportunities**

Strength: (All) Branch: (All)
Status: (All) Employee: (All)

Invoice No.:
Last Name: Estimated Close Date Won/Lost Date
From: To: From: To:
Select By Company Last Name

Contact	Status	Strength	Revenue	OppDate	Invoice No	Salesperson	Branch	Description
...

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.

Opportunities

Customer Relations

Activities: **Opportunities**

Strength: (All) Branch: (All)
Status: (All) Employee: (All)

Invoice No.: Estimated Close Date Won/Lost Date
From: To: From: To:

Locate Customer for Opportunity

Last Name: Telephone:
First Name: City:
Company: Zip Code:

Double click on the customer or press the Exit button to Accept this customer

	First Name	Last Name	Company	Street	C
▶	Store	Stock			
▶	Cash	Sale			
▶	Betty	Boop	Comic Characters R Us	1001 B Ave	Coron
▶	Ana	Beltran		5401 Elgin Ave.	San C
▶	Darlene	King		5111 Orange Ave. #11	San C
▶	Freda	Samson		2245 Market St.	San C
▶	Eva	Kellar		2073 Harrison Ave.	San C
▶	David	Sours		1002 30th St #109	San C

Record: 1

Sort by:

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).

The screenshot shows the 'Opportunity' form with the following fields and values:

- Opportunity Date:** [Empty]
- Customer:** 121 - Ana E Beltran
- Strength:** [Empty]
- Status:** [Empty]
- Approx Purchase Date:** [Empty]
- Won/Lost Date:** [Empty]
- Invoice:** [Empty]
- Branch:** [Empty]
- Salesperson:** [Empty]
- Notes:** [Empty]

The 'Items' table is empty:

Qty	Description	Retail
-----	-------------	--------

Estimated Sale: \$0.00

Buttons: Find, New, Exit

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.

The screenshot shows the 'Opportunity' form with the following fields and values:

- Opportunity Date:** [Empty]
- Customer:** 121 - Ana E Beltran
- Strength:** 2
- Status:** Pending
- Approx Purchase Date:** 5/29/2013
- Won/Lost Date:** [Empty]
- Invoice:** [Empty]
- Branch:** 10 - Showroom
- Salesperson:** Joel
- Notes:** Looking at the Bittersweet Bedroom

The 'Items' table is empty:

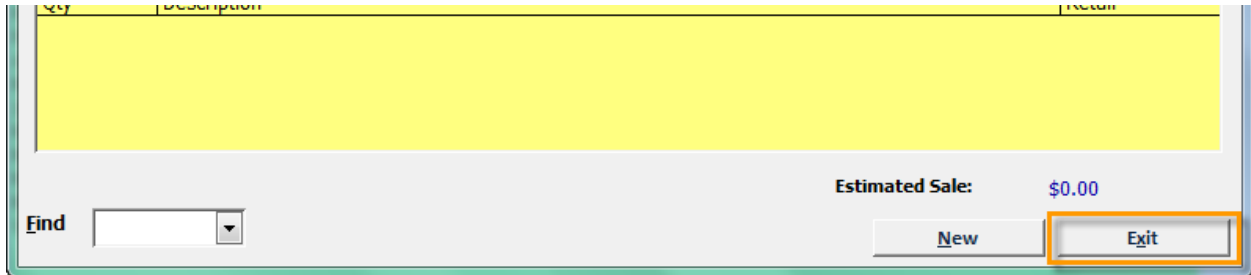
Qty	Description	Retail
-----	-------------	--------

Estimated Sale: \$0.00

Buttons: Find, New, Exit

Exiting the Opportunity Form

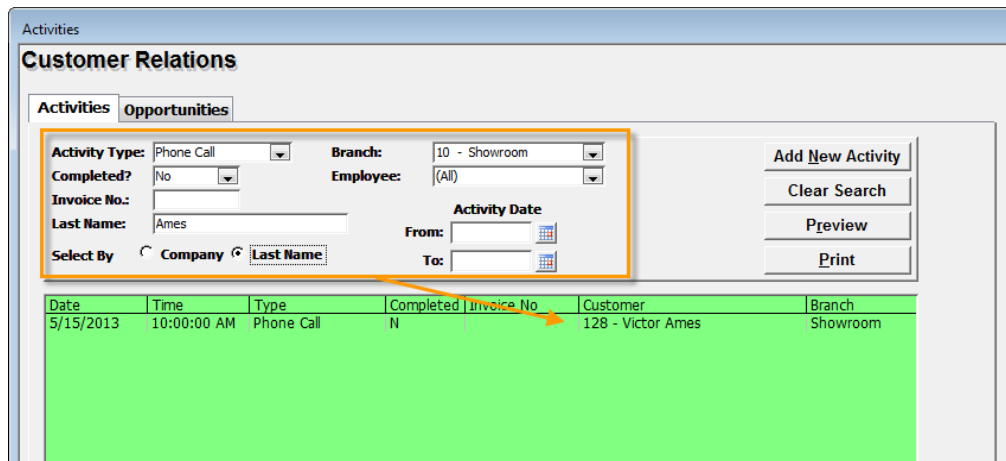
To save the opportunity, simply select the Exit Button or use the keyboard shortcut ALT + X and all information will be saved.



The screenshot shows a window titled "Opportunity" with a yellow background. At the bottom right, there is a button labeled "Exit" which is highlighted with an orange border. To the left of the "Exit" button is a "New" button. Above the "Exit" button, the text "Estimated Sale: \$0.00" is displayed. On the left side, there is a "Find" label and a search input field.

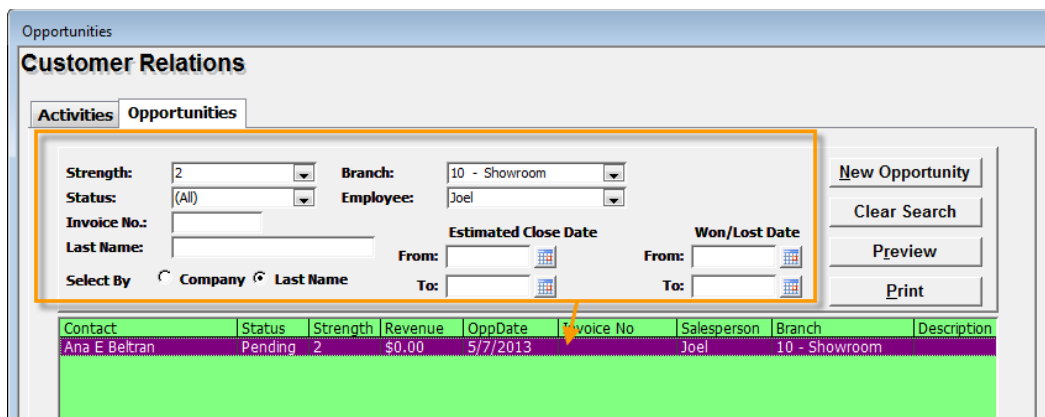
Searching for Activities and Opportunities

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.



The screenshot shows the "Activities" tab selected in the "Customer Relations" form. The search criteria are: Activity Type: Phone Call, Branch: 10 - Showroom, Completed?: No, Employee: (All), Last Name: Ames, and Select By: Last Name. The search results table is as follows:

Date	Time	Type	Completed	Invoice No.	Customer	Branch
5/15/2013	10:00:00 AM	Phone Call	N		128 - Victor Ames	Showroom



The screenshot shows the "Opportunities" tab selected in the "Customer Relations" form. The search criteria are: Strength: 2, Branch: 10 - Showroom, Status: (All), Employee: Joel, and Select By: Last Name. The search results table is as follows:

Contact	Status	Strength	Revenue	OppDate	Invoice No.	Salesperson	Branch	Description
Ana E Beltran	Pending	2	\$0.00	5/7/2013		Joel	10 - Showroom	

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.

The screenshot shows the 'Customer Relations' window with the 'Activities' tab selected. A table lists activities, with the first row highlighted in green and labeled 'Double Click'. An arrow points from this row to a detailed activity form. The form shows details for a 'Phone Call' activity on 5/15/2013 at 10:00 AM, completed by Bryan at the 10 - Showroom branch. The purpose is 'Sale Follow-up' and the description is 'Follow-Up with customer to confirm delivery and setup went well.' Buttons for 'Save and New' and 'Exit' are visible at the bottom.

Date	Time	Type
5/15/2013	10:00:00 AM	Phone Call

Activity Details:

- Activity Type: Phone Call
- Date: 5/15/2013
- Time: 10:00 AM
- Completed?: No
- Purpose: Sale Follow-up
- Outcome:
- Description: Follow-Up with customer to confirm delivery and setup went well.
- Notes:

Customer Information:

- Customer: 128 - Victor Ames
- Branch: 10 - Showroom
- Employee: Bryan

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.

The screenshot shows an 'Invoice' window for invoice number 1080, dated 4/19/2013, with a status of 'Pending'. The 'SOLD TO' and 'SHIPPED TO' information is for Cynthia Varder at 211B Landis Ave, Chula Vista, CA 91910. The invoice includes a table with one line item: 1280439 Sleep Sofa Queen 38 in X 85 in X 39 in Atmore Pewter, priced at \$600.00. The 'Activities' tab is selected, and the 'New' button is highlighted with an orange box and an arrow. The 'Total Due' is \$600.00.

P/O No	Rcvd	Status	Notes	Del	Qty	Description	Price	Ext Price
					1	1280439 Sleep Sofa Queen 38 in X 85 in X 39 in Atmore Pewter	\$600.00	\$600.00

Invoice Summary:

- SubTotal: \$600.00
- Delivery: \$0.00
- Tax: \$0.00
- Total: \$600.00
- Payments: \$0.00
- Total Due: \$600.00

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

The screenshot shows two overlapping windows. The top window is titled "Invoice" and contains the following information:

- Invoice No.: 1080
- Branch: 10
- Invoice Date: 4/19/2013
- Status: Pending
- Sold By: [empty]
- Del Type: [empty]
- Delivery Date: [empty]
- QB Posted: [empty]

The "SOLD TO:" section lists:

- Varder, Cynthia
- Cynthia Varder
- 211B Landis Ave.
- Chula Vista, CA 91910
- Phone: 619-5551212

Below this is a table with columns: P/O No, Rcvd, Status, Notes, Del, Qty. The first row contains: 1, 1280439.

The bottom of the Invoice window has buttons: Void, Modify, New, Print Invoice, and a "Go to" dropdown. There are also "Show Payments" and "Layaway Date: Promise" options.

The "Activity" window is open over the Invoice window. It has the following fields:

- Activity Type: [empty]
- Date: [empty] Time: [empty]
- Completed?: [empty]
- Purpose: [empty]
- Outcome: [empty]
- Description: [empty]
- Notes: [empty]

On the right side of the Activity window, there is a box containing:

- Customer: 358 - Cynthia Varder
- Invoice: 1080
- Branch: 10 - Showroom
- Employee: [empty]

An orange box highlights the Customer, Invoice, and Branch fields in this box. An orange arrow points from the "New" button in the Invoice window to this box.

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

The screenshot shows the "Activity" window with the following fields filled out:

- Activity Type: Appointment
- Date: 5/29/2013 Time: 1:00 PM
- Completed?: No
- Purpose: Schedule Delivery
- Outcome: [empty]
- Description: [empty]
- Notes: [empty]

On the right side, the following information is populated:

- Customer: 358 - Cynthia Varder
- Invoice: 1080
- Branch: 10 - Showroom
- Employee: [empty]

An orange box highlights the Activity Type, Date, Time, Purpose, and Outcome fields.

At the bottom, there is a "Go to" dropdown and buttons for "Save and New" and "Exit".

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.

The screenshot shows two overlapping windows in the Furniture Wizard software. The 'Invoice' window on the left displays invoice details for invoice number 1080, dated 4/19/2013, for customer Cynthia Varde. It includes a table with columns for P/O No, Rcvd, Status, Notes, Del, and Qty. The 'Invoice Notes' tab is active, showing a note for 5/29/2013 with an 'Open' button. The 'Activity' window on the right is titled 'Activity' and shows details for an appointment on 5/29/2013 at 1:00 PM for the same customer. The 'Activity Type' is 'Appointment' and the 'Purpose' is 'Schedule Delivery'. An orange arrow points from the 'Open' button in the Invoice window to the 'Activity' window.

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.

The screenshot shows the main menu of Furniture Wizard Software, Version 15.96, dated 4/14/2016. The software logo is on the left, and the text 'Unreal Interiors' is on the right. The main menu is a dark blue panel with several options: 'On Sale', 'Suppliers', 'Customers', 'Reconcile Drawer', 'Mini Scanner', and 'Receive PO's'. The 'Customers' option is highlighted with an orange rectangular box.

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

Customers - Store Stock

Customer History

Customer Number: 1

Salutation:

First Name: Store MI:

Last Name: Stock

Company:

Street:

Suite:

City:

State: Zip:

Country:

Phone:

Work Phone:

Cell Phone:

Fax Number:

Other Phone:

Customer Details | Additional Information | History

Email Addresses

Primary:

Other:

Referred By:

Date of Birth:

Customer Type:

Quick Pay:

Invalid Address:

Comments:

Use this customer for repairing Store Stock Items in the Service module. DO NOT DELETE THIS CUSTOMER.

Invoice Notes:

Customer Alert Notes:

New Edit Delete **Find** Reports Thank You Letter Mailing Label Merge Create Invoice Exit

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

Customers - Irene Blain

Customer History

Customer Number: 356

Salutation:

First Name: Irene MI:

Last Name: Blain

Company:

Street: 312 Calle La Quinta

Suite:

City: Chula Vista

State: CA Zip: 91913

Country:

Phone: (619) 555-1212

Work Phone:

Cell Phone:

Fax Number:

Other Phone:

Customer Details | Additional Information | History

Email Addresses

Primary:

Other:

Referred By:

Date of Birth:

Customer Type:

Quick Pay:

Invalid Address:

Comments:

Invoice Notes:

Customer Alert Notes:

New Edit Delete Find Reports Thank You Letter Mailing Label Merge Create Invoice Exit

To see all activities or opportunities assigned to the selected customer, select the History Tab and select with 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.

Customers - Victor Ames

Customer History

Customer Number: **128**

Salutation:

First Name: Victor **MI:**

Last Name: Ames

Company:

Street: 3869 Caminito Aguilar #A

Suite:

City: San Diego

State: CA **Zip:** 92111

Country:

Phone: (619) 555-1212

Work Phone:

Cell Phone:

Fax Number:

Other Phone:

Customer Details **Additional Information** **History**

Accounts Receivable

Current	30 Days	60 Days
\$0.00	\$0.00	\$0.00
90 Days	120+ Days	Total AR
\$0.00	\$0.00	\$0.00

Update Customer

This Customer

All Customers

Sales Order History

12 Months	Total YTD	All Time
\$0.00	\$0.00	\$0.00

Invoice Service Quotes Payments **Activities** Opportunities

History

Date	Time	Type	Invoice	Completed?
5/15/2013	10:00:00 AM	Phone Call		N

Double Click to Open

New Edit Delete Find Reports Thank You Letter Mailing Label Merge Create Invoice Exit