

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:

Select By Company Last Name

Activity Date
From: To:

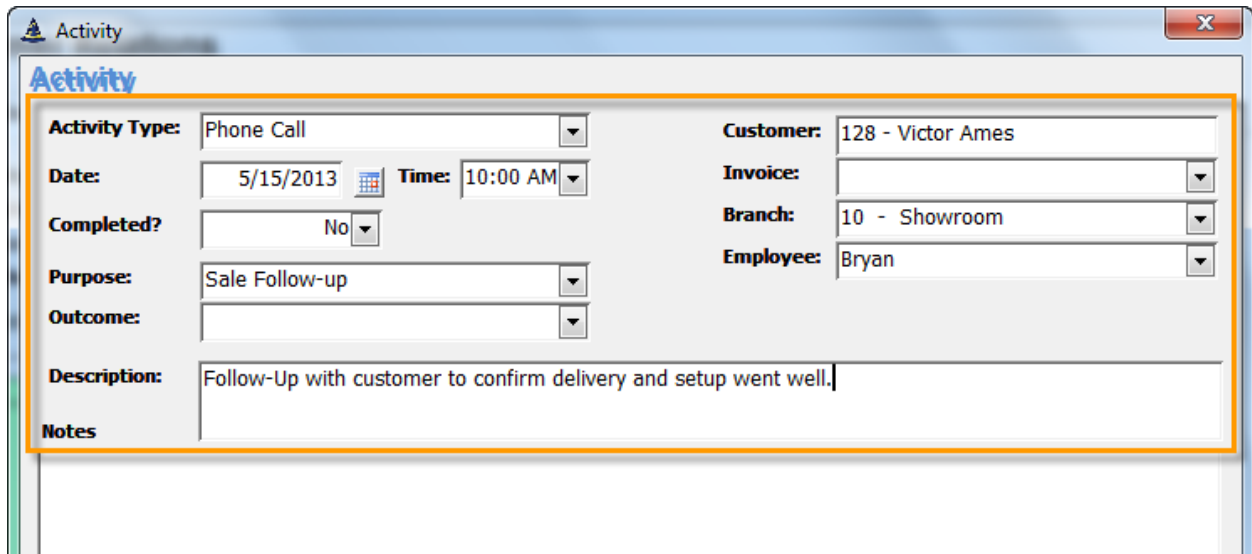
Add New Activity

Preview

Print

Date	Time	Type	Completed	Invoice No	Customer	Branch
------	------	------	-----------	------------	----------	--------

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.

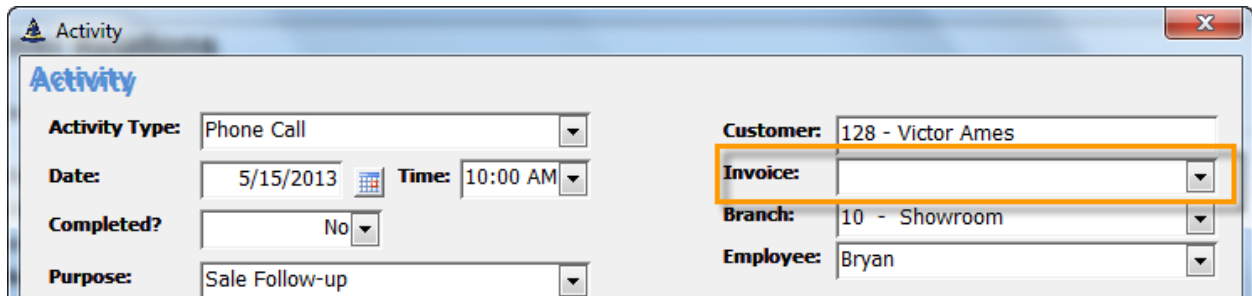


The screenshot shows a software window titled "Activity" with a close button in the top right corner. The window contains a form with the following fields:

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

An orange rectangular border highlights the main form area, including the Activity Type, Date, Time, Completed?, Purpose, Outcome, Description, and Notes fields.

**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 window as above, but with a different focus. An orange rectangular border highlights the **Invoice:** dropdown menu field.

The form fields are the same as in the previous screenshot:

- Activity Type:** Phone Call (dropdown menu)
- Date:** 5/15/2013 (calendar icon) **Time:** 10:00 AM (dropdown menu)
- Completed?:** No (dropdown menu)
- Purpose:** Sale Follow-up (dropdown menu)
- Customer:** 128 - Victor Ames (text input)
- Invoice:** (dropdown menu, highlighted with orange border)
- Branch:** 10 - Showroom (dropdown menu)
- Employee:** Bryan (dropdown menu)

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

Below the Description field is a large text area labeled "Notes" which is 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, the "Save and New" and "Exit" 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.

The screenshot shows the 'Opportunities' window with the 'Customer Relations' tab selected. The 'Activities' dropdown menu is set to 'Opportunities'. The 'New Opportunity' button is highlighted with an orange arrow. The window contains various filters and search options, including Strength, Status, Invoice No., Last Name, Estimated Close Date, and Won/Lost Date. There are also buttons for Preview and Print.

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.

The screenshot shows the 'Opportunities' window with the 'Customer Relations' tab selected. The 'Activities' dropdown menu is set to 'Opportunities'. The 'New Opportunity' button is highlighted with an orange arrow. A dialog box titled 'Locate Customer for Opportunity' is open, showing a table of customers. The dialog box contains fields for Last Name, First Name, Company, Telephone, City, and Zip Code. The table lists customer information, including First Name, Last Name, Company, Street, and City. The 'New Opportunity' button is highlighted with an orange arrow.

	First Name	Last Name	Company	Street	City
▶	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

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:

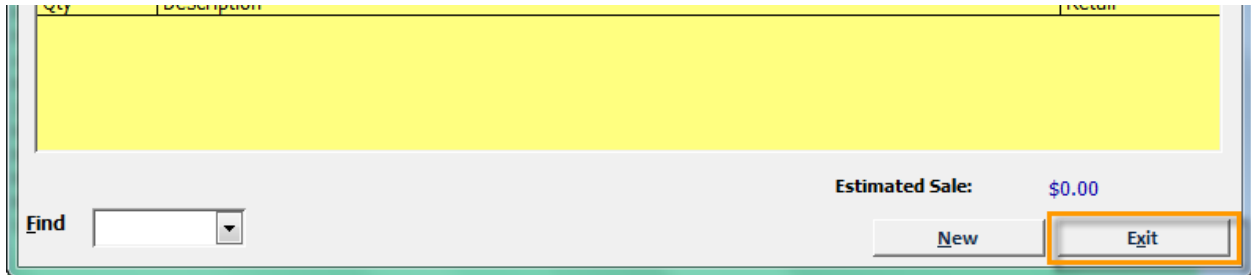
Qty	Description	Retail
-----	-------------	--------

Estimated Sale: \$0.00

Buttons: Find, New, Exit

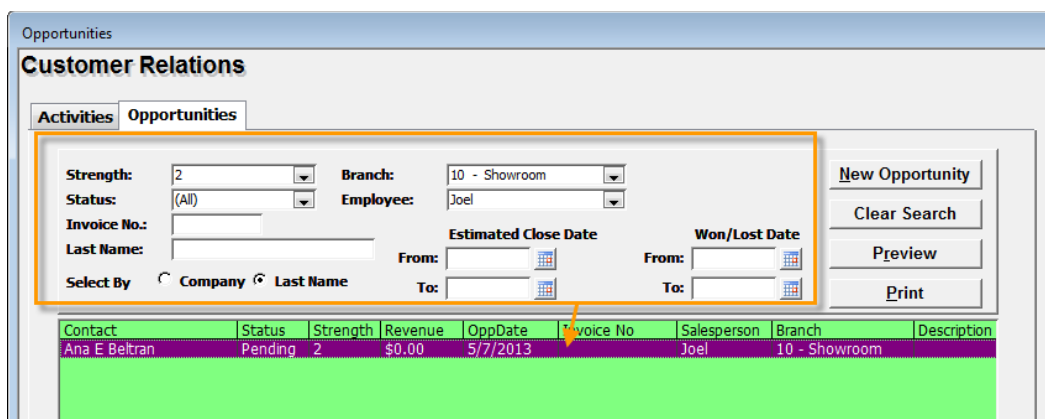
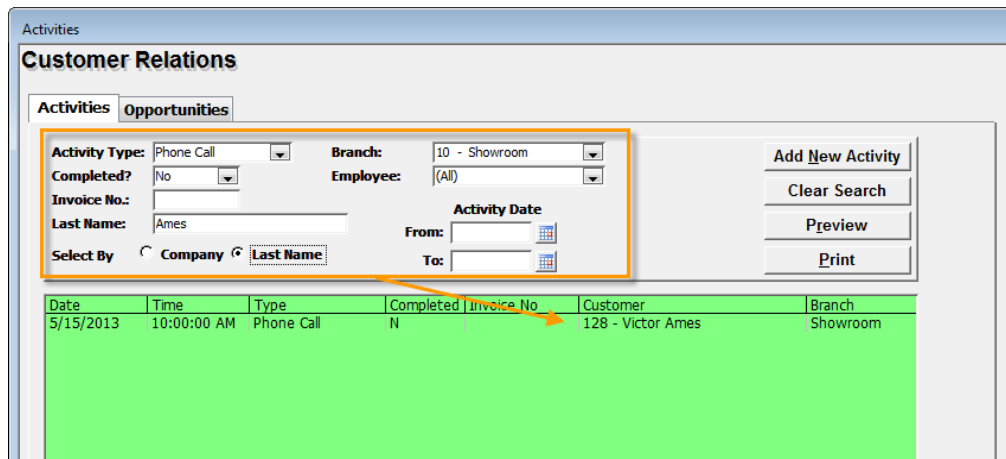
Exiting the Opportunity Form

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



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.

The screenshot shows the 'Activities' window with the 'Customer Relations' tab selected. The 'Activities' sub-tab is active, displaying a list of activities. The first activity is highlighted in purple, and a green box with the text 'Double Click' is overlaid on it. An orange arrow points from this box to the 'Activity' detail window that opens. The 'Activity' window shows the following details:

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

Buttons at the bottom of the 'Activity' window include 'Go to', 'Save and New', and 'Exit'.

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 the 'Invoice' window for invoice number 1080. The 'Activities' tab is selected, and the 'New' button is highlighted with an orange box and an orange arrow. The invoice details are as follows:

- Invoice No.: 1080
- Branch: 10
- Invoice Date: 4/19/2013
- Status: Pending
- Del Type: (empty)
- Delivery Date: (empty)
- QB Posted: (empty)

The 'SOLD TO' and 'SHIPPED TO' information is identical:

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

The invoice table contains one line item:

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

Summary information at the bottom right:

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

Buttons at the bottom include 'Void', 'Modify', 'New', 'Print Invoice', 'Process', 'Delivery', 'New Item', 'Copy Item', and 'Exit'.

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 background window is titled "Invoice" and displays details for invoice number 1080, branch 10, and invoice date 4/19/2013. The "SOLD TO" information is for Cynthia Varder. The foreground window is titled "Activity" and contains several fields. An orange box highlights the "Customer" field (358 - Cynthia Varder), "Invoice" field (1080), and "Branch" field (10 - Showroom). An orange arrow points from the "New" button in the Invoice window to this highlighted area.

P/O No	Rcvd	Status	Notes	Del	Qty
					1

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 several fields filled out. An orange box highlights the "Activity Type" field (Appointment), "Date" field (5/29/2013), "Time" field (1:00 PM), "Completed?" field (No), "Purpose" field (Schedule Delivery), and "Outcome" field. The "Customer" field is 358 - Cynthia Varder, "Invoice" is 1080, and "Branch" is 10 - Showroom.

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, sold by Cynthia Varder. It includes a 'SOLD TO' section with customer information and a table with columns for P/O No, Rcvd, Status, Notes, Del, and Qty. Below the table are fields for Type, Taxable, and Ref By, along with a 'Show Payments' button. The 'Activity' window on the right is titled 'Activity' and contains fields for Activity Type (Appointment), Date (5/29/2013), Time (1:00 PM), Completed? (No), Purpose (Schedule Delivery), Outcome, Description, and Notes. It also includes fields for Customer (358 - Cynthia Varder), Invoice (1080), Branch (10 - Showroom), and Employee. At the bottom of the Activity window are 'Go to', 'Save and New', and 'Exit' buttons. 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 interface features the Furniture Wizard Software logo and the text 'Unreal Interiors'. Below the logo, there are two tabs: 'Main Menu' and 'Additional Features'. The 'Main Menu' tab is active, displaying a list of options: 'Currently Logged on from: ASUSTOUCH', 'On Sale', 'Suppliers', 'Customers', 'Reconcile Drawer', 'Mini Scanner', and 'Receive PO's'. The 'Customers' option is highlighted with an orange 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

Customer Details | Additional Information | History

Salutation: []

First Name: Store MI: []

Last Name: Stock

Company: []

Street: []

Suite: []

City: []

State: [] Zip: []

Country: []

Phone: []

Work Phone: []

Cell Phone: []

Fax Number: []

Other Phone: []

Email Addresses

Primary: [] Date of Birth: []

Other: []

Referred By: [] 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

Customer Details | Additional Information | History

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: []

Email Addresses

Primary: [] Date of Birth: []

Other: []

Referred By: [] 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 Number: **128**

Customer History

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

Sales Order History

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

Invoice | Service | Quotes | Payments | **Activities** | Opportunities

Update Customer

This Customer

All Customers

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