User Reference

Opportunity Management v10x (ADF)

By CMiC

CMiC
Computer Methods
international Corp.

Proprietary Notice

Computer Methods International Corp.
4850 Keele Street
Toronto, Ontario M3J 3K1
Canada

Risk of Use Notice

User Reference Guide – Version: **CMiC Open Enterprise v10x** Printed: **March 29, 2019**

Contents

Opportunity Management – ADF

Overview – Opportunity Management

Opportunity Management has been designed to assist with the coordination, management and decision making required during the sales process. In particular, it has been developed to support the Complex Sale, which involves the participation of multiple persons on both the buying and selling sides.

Enterprise Opportunity Management allows you to:

- Create Strategies – detailed plans that identify the activities you must perform to close the sale.
- Effortlessly schedule and coordinate the selling process between the sales team members; ensure that everyone has the exact same information regarding the status of opportunities.
- Forecast both the probability of closing and the closing date.
- Complete financial future forecasts using Job Level Time Phasing and Opportunities.
- Monitor the cost of the sales process, including Risk Management.
- Evaluate the feasibility of sales prospects by considering competition, history, potential revenue forecasts, strategy and trends; aids in determining what sales prospects to focus on.
- Evaluate the effectiveness of different marketing strategies.
- Pull together Proposals by querying your corporate database.

The Opportunity Management (**OM**) module works with three primary objects and two secondary, optional objects. The three primary objects are necessary to track past sales efforts and to schedule and coordinate current efforts. The two optional objects are necessary if your company wants to closely integrate the OM module with the Project Management (**PM**) and Job Costing (**JC**) modules, by beginning data entry for these shared objects in the OM module.

The first primary object is referred to as an **Organization**, which is a company that can have potential sales prospects. This object is detailed by the company's name, address, contact information, and other company details. Optionally, an organization may also be a vendor (supplying materials for a project) or an independent contractor.

The second primary object is an O**pportunity**, and it is a particular sales prospect that an organization can have. This object is more complex, in that it is detailed by potential revenue, Opportunity Team members, accounting and other relevant information. The level of details required, however, depend on how closely your company wants to track sales efforts, and how closely it wants to integrate the OM module with the PM and JC modules. As more integration is required, more details are required.

The third primary object is an **Action Item**. Action Items are scheduled sales actions, aiming to win an opportunity, and they show up on the Calendar application.

The first optional object is a **Project**, and it is automatically created when an opportunity is created. The difference between an Opportunity and a Project is that an Opportunity is relevant in the OM module (dealing with sales tasks) and a Project is relevant in the PM module (dealing with project management tasks).

The second optional object is a **Bid Job**, and whether or not it is automatically created when an opportunity is created is optional. A Bid Job is a potential job, and if it is won, it becomes a Job object that is relevant in the Job Billing module. A Bid Job, on the other hand, is available in the OM and JC modules. In the OM module, a Bid Job can be used to begin entering data for a Job, and to record the pre-contract costs incurred during the bid process. Once a bid has been won, there is the option of transferring the pre-contract costs to the actual job. Another potential use of tracked pre-contract costs is to identify any overspending or underspending during the sales phase. Also, in the OM module, a Bid Job can be used to begin entry of the bid/estimate information required for bidding.

In regards to the functionality in the OM module, for consistency and simplicity, the functionality for handling Contacts, Notes, Attachments, and similar objects like Action Items (used in this module), Vendor Items, Work Items, and Asset Items, is the same throughout the Enterprise system.

Important Note – JSP & ADF Opportunity Management

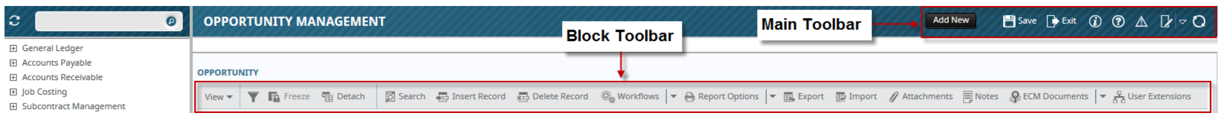
Note, only one version of the Opportunity Management module should be used at a time, as using both versions can lead to loss of entered data.

It is recommended that the enhanced ADF version of Opportunity Management is used.

To help with moving to the ADF version of Opportunity Management, please refer to the Importing *OM-JSP UDFs & Data into OM-ADF* section under this guide's Appendix.

Common Functionality

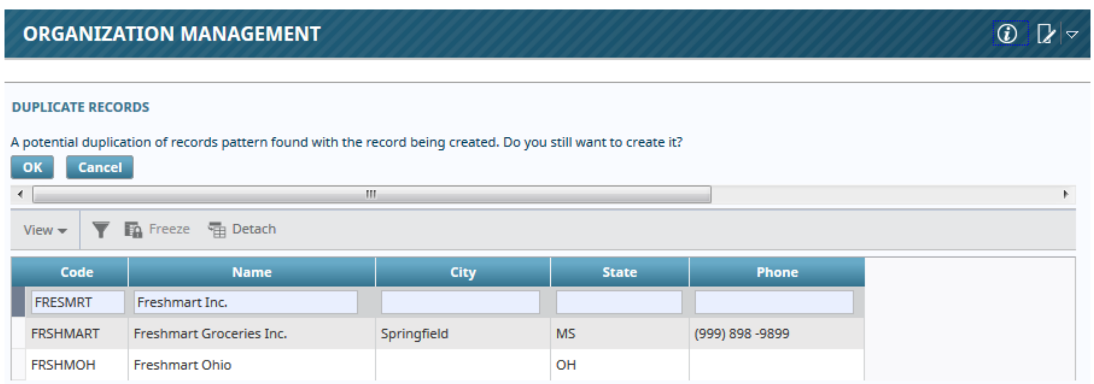
Main Toolbar & Block Toolbar



The screenshot above shows a sample of a Main Toolbar and a Block Toolbar.

For details about the options of these menus, which include details about searches and filters, please refer to the Getting Started reference guide.

Minimize Duplication of Records



Sample of the screen that pops up to notify user that similar records already exist.

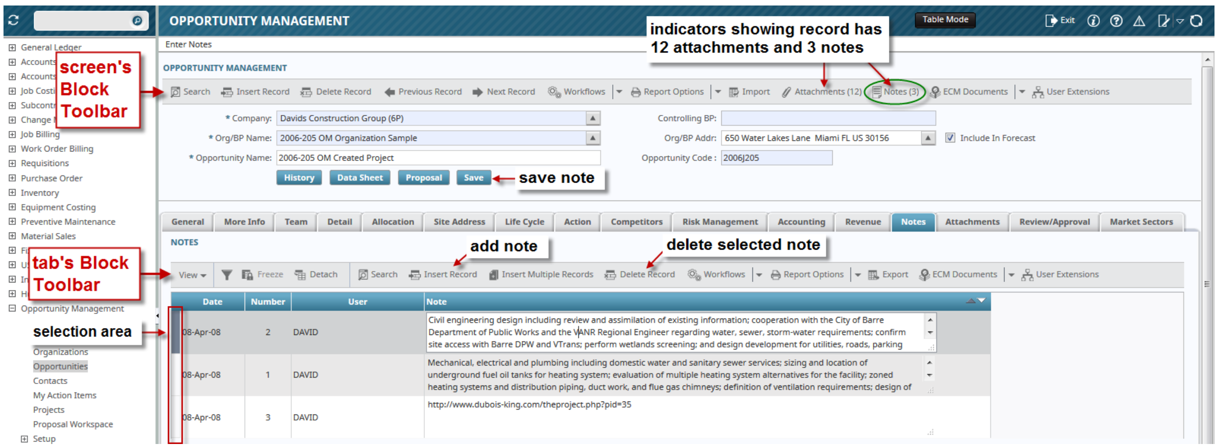
The duplication of Organization, Opportunity, and Contact records can lead to various problems. Often, a duplicate entry of one of these records occurs because users use different variations of names and the user creating a duplicate record did not fully confirm that the record does not already exist. This can then result in users referring to different records for the same organization, opportunity or contact, and it also results in clutter.

To address this issue, the Opportunity Management module has a function that when enabled, checks if a similar entry already exists. When a user saves a new record, if similar records already exist, a screen will pop up to notify the user of the potential duplication. The flag to enable this option is labeled **Enable De-duplication Searching Function**, and it is found on the Company Control (OM Control File) screen under System Options. For details about this option, please refer to the System Options sub-section of the *Company Control* section in this reference guide. The relevant sections under the *System Options* sub-section are: *Enable De-duplication Searching Function* and *De-Duplication Searching Function – Parameter List*.

Also, for registration code, the system checks business partners for duplicate codes. If the **System Wide Unique Registration Code** flag is unchecked, the system gives a soft warning in a pop-up, informing the user with a list of business partners with duplicate registration codes.

NOTE: If the **Enable De-duplication Searching Function** flag is checked, new entries of Organization, Opportunity, and Contact records can only be made when the screens to enter them are in Form Mode. This is necessary to prevent more than one record being saved at the same time, which cannot be handled by the De-duplication Searching function.

Notes



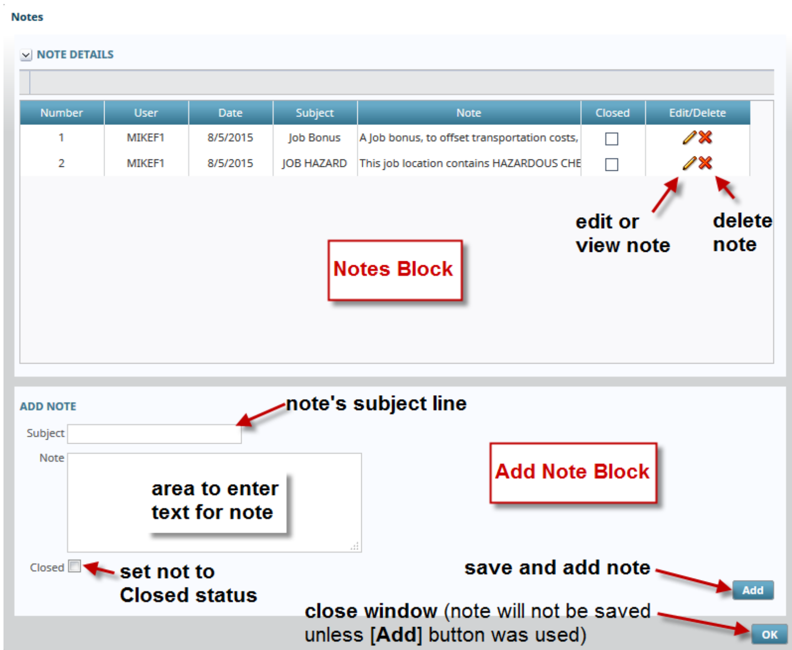
Sample of a Notes tab, which is common to the Organizations, Opportunities, and Projects screens.

The **Notes** tab is common to the Organizations, Opportunities, and Projects screens of the Opportunity Management module, and its functionality is the same for each of these screens. These tabs handle the display and management of the notes associated to the record. If there are any associated notes, the **Notes** option on the screen's Block Toolbar will indicate how many (as shown above).

NOTE: If a note is entered for an opportunity using the screen's Block Toolbar, not the tab's Block Toolbar, the note will be copied over to the corresponding project. For all other records, the note stays within the record it was entered.

There are two options for adding a note to a record. One option is on the screen's Block Toolbar, and the other option is on the tab's Block Toolbar. Except when entering a note for an opportunity, as mentioned in the above note, the end result is the same. There is, however, a difference in what additional information can be associated with the note. Through the screen's Block Toolbar option, you can enter a subject line and indicate if the note is in an open or closed state (meaning varies between companies).

Notes on Screen's Block Toolbar



Sample of a Notes screen, common throughout CMiC Enterprise

The above screenshot shows the Notes screen that is displayed when the Block Toolbar's **Notes** option is used. In the Notes Block area, the displayed fields are for display only.

The Closed field indicates if the note's status is Closed or Open. The Closed status can have different meanings for different companies. One meaning, for instance, is that the note is no longer current.

To edit or view a note, click the corresponding Pencil Icon. To edit a note, make the edits and click [**OK**]. To permanently delete a note, click the corresponding Delete Icon ('**X**') and click [**OK**].

To add a note, using the Add Note Block area. Enter the note's subject line, if desired, and enter the note in the text area. The **Closed** check-box is available if the note's entry is belated and no longer current, but could still be helpful. Once the note's information has been entered, click the [**Add**] button to save and add the note. The note will then be displayed in the Notes Block, as shown in the above screenshot.

Click the [**OK**] button to close the window, but note, this will not save the note. To save the note, the [**Add**] button must be used.

REMINDER: If a note is entered for an opportunity using this method, the note will be copied over to the corresponding project. For all other records, the note stays within the record it was entered.

Notes on Tab's Block Toolbar

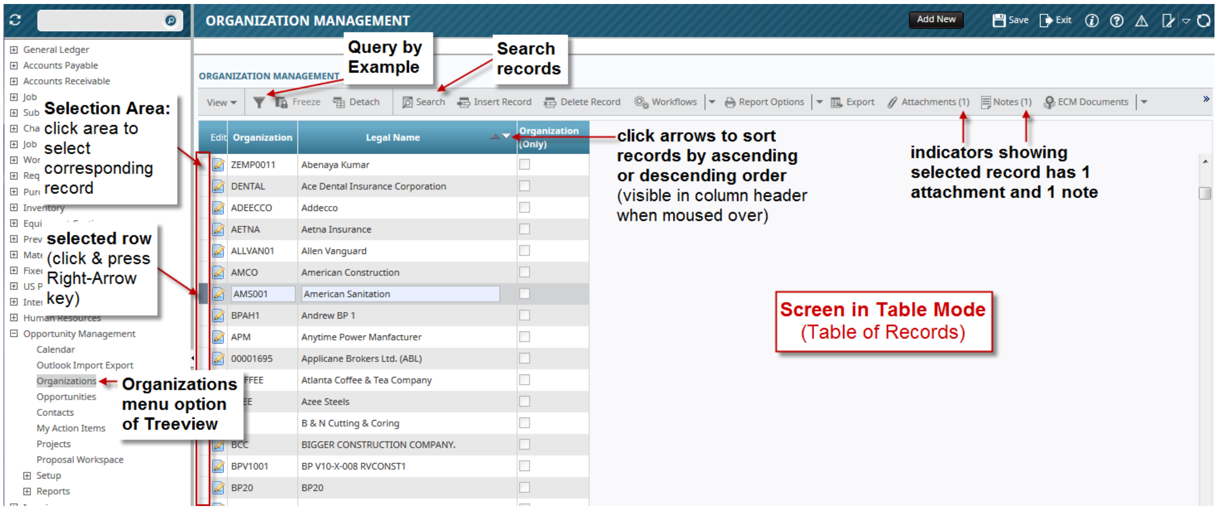
This toolbar's options are the quickest and most straightforward way to add, edit or delete a note.

To add a note, click [**Insert Record**] on the tab's Block Toolbar. Enter the note in the new row's text area and click the [**Save**] button on the Main Toolbar.

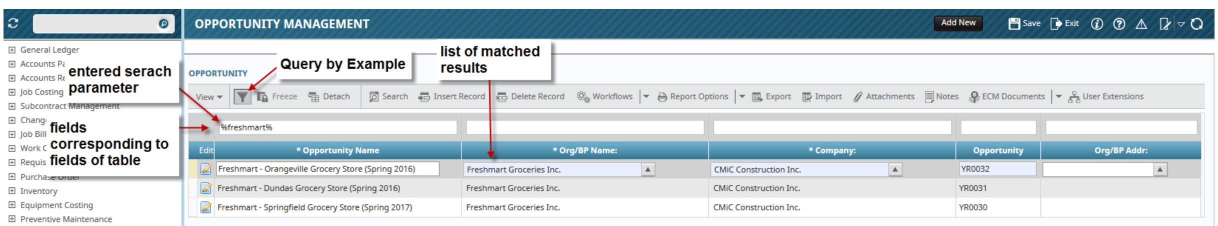
To delete a note, select the note using the corresponding selection area, as shown in this section's first screenshot, and click [**Delete Record**] (on tab's Block Toolbar).

To edit a note, make the necessary edits and click [**Save**].

Search for Record



Sample of a screen in Table Mode, listing records. In this screenshot, an Organization screen is shown, listing organizations.



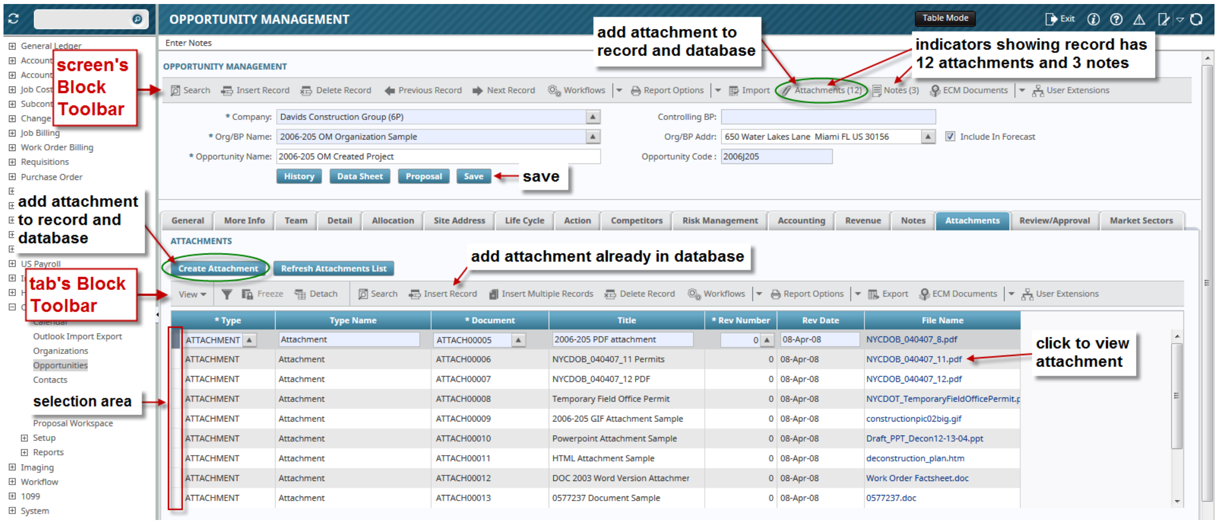
Sample of a screen, in Table Mode, after the Query by Example option was used.

Navigate to the relevant screen (application) using the Treeview menu. With the screen in Table Mode, you can search the list of records by following these steps:

- Click the **Query by Example** option of the Block Toolbar, as shown in the above screenshot. A row of empty fields that correspond to the fields of the table will be displayed.
- In a field that corresponds to a record's name, of the Query by Example row, enter the name. To ensure that an entry has not been made using a different version of the name, type in the portion of the name that most likely would have been entered, and use the wildcard character "%" on either side of it so that all partial matches will be returned. Press Enter to run the search.

NOTE: Details about searches and filters can be found in the *Searches and Table Filters and Sorts* section of the Getting Started reference guide.

Attachments



Sample of an Attachments Tab, common to the Organizations, Opportunities, Contacts, and Projects screens

The **Attachments** tab is common to the Organizations, Opportunities, Contacts, and Projects screens of the Opportunity Management module, and its functionality is the same for each of these screens. These tabs handle the display and management of the attachments added to the record, and if a record has any added attachments, the [**Attachments]** button on the screen's Block Toolbar will indicate how many (as shown above).

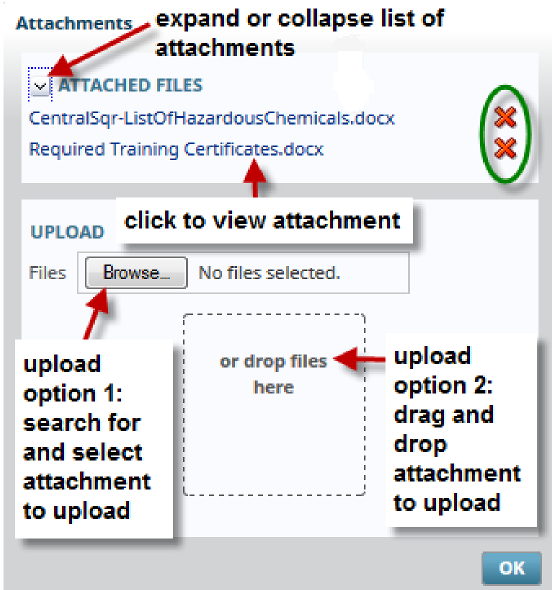
Availability of Attachments between Associated Records

In the Opportunity Management module, there are four types of records that can be associated to each other and have shared attachments. To summarize, an Opportunity is associated to an Organization, which is associated to a Project, and these three types can be associated to a fourth, Contacts.

When an attachment is added to any of these four record types, using either the [**Attachments**] button (on screen's Block Toolbar) or the [**Create Attachment**] button (on **Attachments** tab's Block Toolbar), it will also be added to the database. The following table details how attachments are shared between these types of records:

Record Type	Availability to This Record	Availability to Associated Records
Organization	Attachments added to any associated record can be added to this record type through the [**Insert Record**] button.	Added attachments are available to associated Project and Contact records through the [**Insert Record**] button.
Opportunity	No attachments added to associated records are available to this record type.	Added attachments are available to associated Organization and Contact records through the [**Insert Record**] button, and automatically attached to corresponding Project record.
Project	Attachments added to any associated record can be added to this record type through the [**Insert Record**] button.	Added attachments are available to associated Organization and Contact records through the [**Insert Record**] button.
Contact	Attachments added to any associated record can be added to this record type through the [**Insert Record**] button.	Added attachments are available to associated Organization and Project records through the [**Insert Record**] button.

NOTE: Project Management security settings can change the availability of attachments for a user.



*Sample of Attachments window launched by [**Attachments**] button on screen's Block Toolbar.*

View Attachment

There are two methods to view a record's attachment:

1. On the **Attachments** tab, click its file name under the **File Name** column, as shown in this section's first screenshot, then select an application to open and view it.
2. Click the [**Attachment**] button on the screen's Block Toolbar, and in the Attachments window that pops up, click the attachment's file name (see the above screenshot).

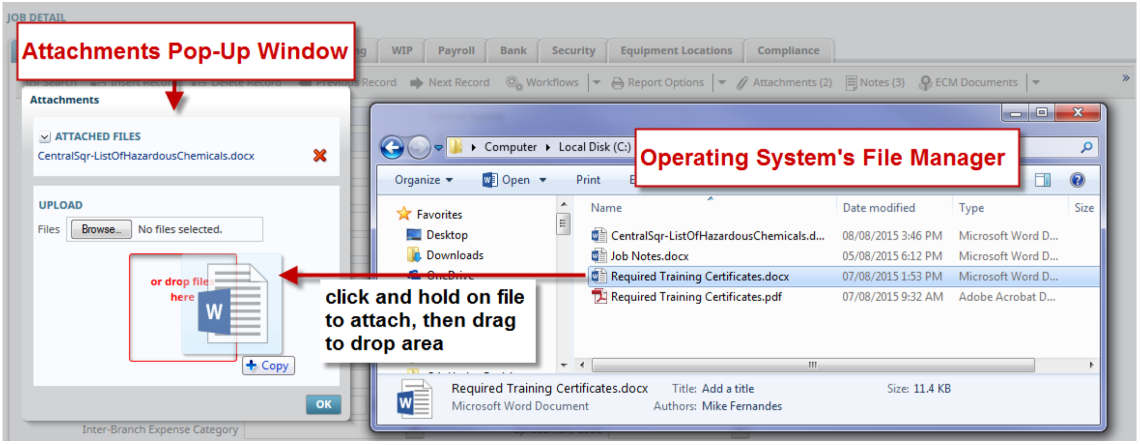
Add New Attachment to Record & Database

To add a new attachment to a record, which automatically adds it to the database, use either of these two methods:

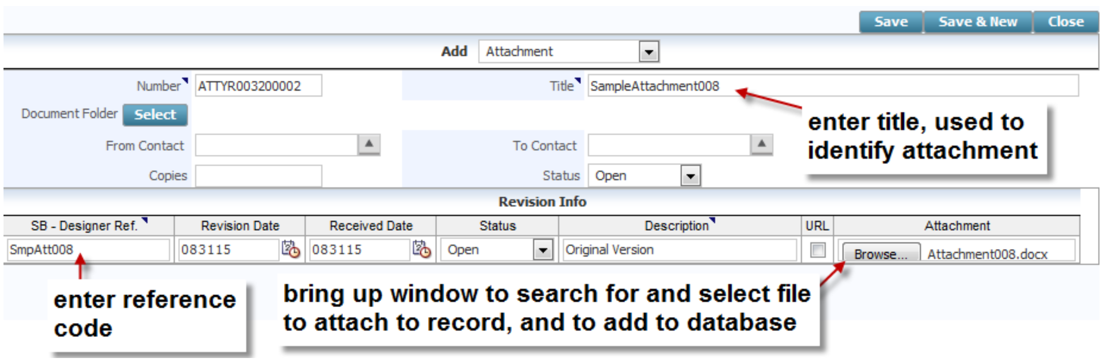
Attachments Button (Screen's Block Toolbar)

Click the [**Attachment**] button on the screen's Block Toolbar. In the Attachments window that pops up, you have two options.

1. Click the [**Browse**] button, and in the window that pops up, search for and select the file to upload. Back in the Attachments window, click [**OK**] when the upload is complete.
2. If you have a File Manager window already open, you can use the drag-and-drop method to attach the file by clicking and holding the mouse button on the file to attach, and then dragging it over to the outlined drop area in the Attachments window, as shown in the screenshot below. Once the upload is complete, click [**OK**] to complete the attachment.

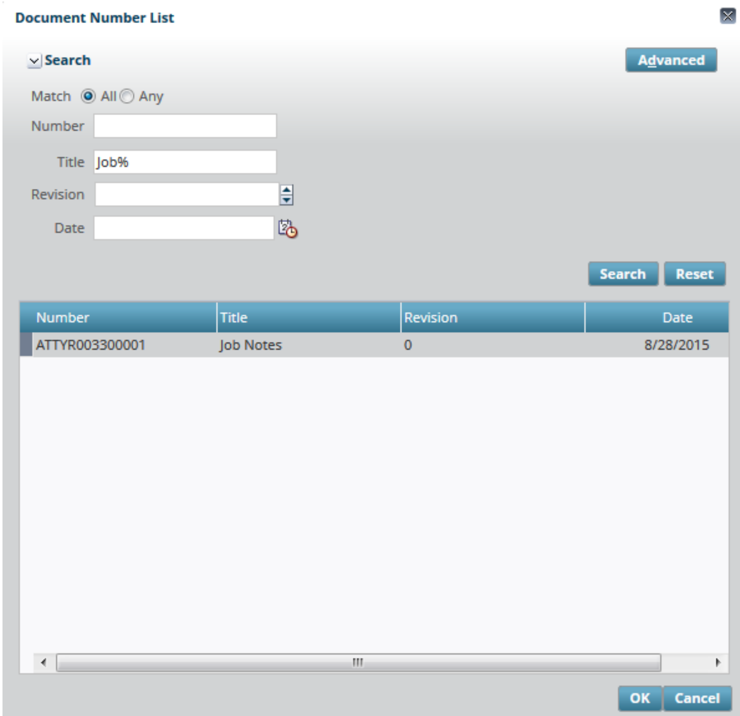


Create Attachment Button (**Attachments** tab's Block Toolbar)



Click the [**Create Attachment**] button, on the Attachments tab's Block Toolbar, as shown in this section's first screenshot. In the new browser window, as shown above, enter a name for the attachment using the **Title** field, and a reference code using the **SB – Designer Ref.** field. If necessary, you can change any of the automatically populated values. Click [**Browse**] to bring up a window to search for and select the file to attach. Back in the Create Attachment window, as shown above, click [**Save**] and then [**Close**]. Finally, click the [**Refresh Attachment List**] button, which is next to the [**Create Attachment**] button.

Add Attachment Already in Database



Sample of screen that pops for choosing an attachment already in database, after using the ***Document*** *drop-down list*

For Organization, Contact, and Project record types, you can add an attachment that has already been added to the database. To do so, click the [**Insert Record**] button on the **Attachments** tab's Block Toolbar. A new row will appear in the table that lists the record's attachments.

First, you must use the drop-down list under the **Type** column to select "**Attachment**", before you can select the attachment through the **Document** field. The type selected through the **Type** field controls what document type is available from the **Document** field. Using the window that pops up after clicking the up-arrow  on the **Document** drop-down list, as shown above, select the attachment to attach. If you need to search for the attachment, enter its title in the **Title** field, and if necessary, use the wildcard character "%" to return all partial matches (shown above).

NOTE: For details about searches, please refer to the *Searches and Table Filters and Sorts* section of the Getting Started reference guide.

When the desired attachment is found, select it and click [**OK**].

Remove Attachment from Record

The following are the two options to remove an attachment from a record:

Attachments Button (Screen's Block Toolbar)

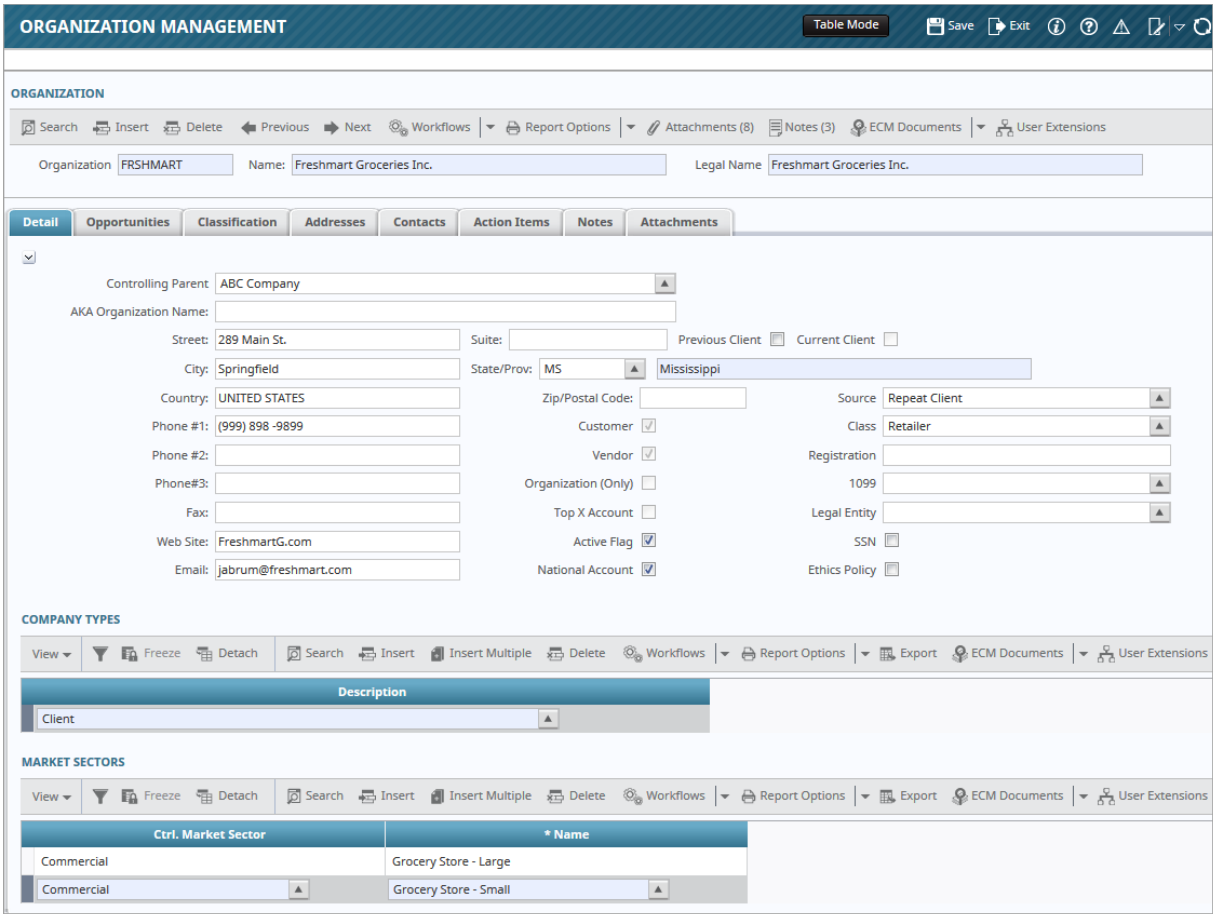
Click the [**Attachment]** button on the Block Toolbar. In the window that pops up, click the red "**X**" next to the attachment, and confirm the deletion.

Delete Record Button (Attachments Tab's Block Toolbar)

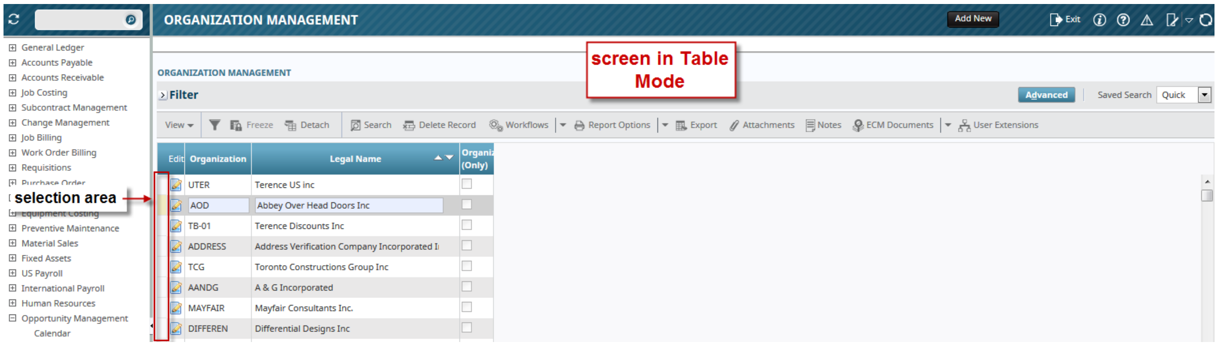
On the **Attachments** Tab, select the attachment using the selection area, as shown in this section's first screenshot. Next, click the [**Delete Record**] button on the Attachment tab's Block Toolbar, and then click [**Save**], on the Main Toolbar (along top-right of screen).

Organizations

Overview – Organizations



Sample of Organization screen in Form Mode; 3 Sections, each with own Block Toolbar: ***Organization***, ***Company Types***, *and* ***Market Sectors***



Sample of Organization screen in Table Mode.

NOTE: For details about the options of the Main Toolbar (options apply to whole screen) and the Block Toolbars (options apply to particular section of screen), please refer to the Getting Started reference guide.

In the OM module, Organization records are for potential sales prospects (customers), organizations to which your company subcontracts out work, and for vendors that supply materials or services. Organization records, like Business Partner records, are created at the System Level (available to all Companies in the system).

An Organization record is a variation of a Business Partner record. It has additional fields that are relevant to opportunity management tasks. When an Organization record is created, the user has the option of checking or unchecking its **Organization (Only)** flag. If the flag is checked, the new record will only be available in the OM module, and if unchecked, it will be available throughout CM*i*C Enterprise as a Business Partner record. Also, like Business Partner records, an Organization record can be extended with Customer and Vendor records.

Organizations allow you to track:

- Contact information for potential opportunities
- Multiple contact names
- Sales representatives, potential revenue, industry, lead source and marketing campaign details
- Past and current Actions Items, such as sales calls and meetings

For convenience, the **Organizations** screen, in Form Mode (displaying a single record), contains tabs for an Organization's associated Opportunities, Action Items, Contacts and other relevant object types used in the OM module. This conveniently groups all of an organization's associated objects into one place. From these tabs, you can launch the object's corresponding screen to view its details, or to add a new instance of that object. For example, from the **Opportunities** tab, you can launch the same Opportunities screen (application) that is launched through the Treeview menu. The only difference is that when you launch the Opportunities screen from the Organizations screen to add a new opportunity, the opportunity is automatically associated with the displayed Organization.

NOTE: Due to customizations, the data fields on the screens of Opportunity Management may vary.

Add New Organization

Ensure Organization Has Not Already Been Added

As a member of the sales team, you may not know that your company already has some type of business with your prospect. Step one, then, is to ensure the organization does not already exist so that you do not duplicate already existing data, and to ensure that you do not miss any important information. Refer to the sub-section

Search for Record under the *Common Functionality* section for instructions on how to search for an organization and ensure that it does not already exist.

NOTE: The OM module has a backend process that can be enabled to greatly reduce unintended duplications. The flag to enable this option is labeled **De-duplication Searching Function**, and it is found in the Company Control screen (OM Control File). For details about this option, please refer to the *System Options* sub-section of the *Company Control* section in this reference guide. The relevant sub-sections under the System Options section are: *Enable De-duplication Searching Function* and *De-Duplication Searching Function – Parameter List*.

If the organization in question does not appear in the list, you are clear to go ahead and add the organization. However, if the organization appears to be in the list, you may want to view its details by clicking the corresponding **Edit** icon to ensure it is the relevant company, and to ensure that you do not miss any important notes, attachments or other important information.

Add Organization

NOTE: If the **Enable De-duplication Searching Function** flag is checked, new entries of Organization, Opportunity, and Contact records can only be made when the screens to enter them are in Form Mode. This is necessary to prevent more than one record being saved at the same time, which cannot be handled by the De-duplication Searching function.

To add an organization, when the screen is in Table Mode (listing all organizations), press the [**Add New**] button, as shown in this section's first screenshot. To add a new organization in Form Mode (displaying one organization), click the **[Insert Record**] button on the Block Toolbar of the **Organization** section, as shown in the second screenshot.

On the **Detail** tab, fill in the fields relevant to your specific needs, using the descriptions provided for the fields in the following *Detail – Tab* section. Note that, since an organization is a type of business partner, considerations for how a business partner is coded must be taken into account before creating a new organization, to avoid issues with the code's use throughout the system. Also, you can control whether or not the new organization is available throughout Enterprise using the **Organization (Only)** flag, as detailed by the table in the *Detail – Tab* section.

After entering the details for the organization, press the Main Toolbar's [**Save**] button to save the organization. After filling in the data for the Organization using the **Detail** tab, you can enter associated data using the other tabs, or by using the corresponding menu options of the Treeview. Through the tabs, however, any additions are automatically associated with the current organization.

View/Edit Organization

Navigate to the **Organizations** option in the Treeview menu, following this standard path: **Opportunity Management** > **Organizations**. With the Organization screen in Table Mode, search for the organization using the **Query by Example** option on the Block Toolbar, as detailed by the sub-section *Search for Record* under the *Common Functionality* section in this reference guide. Click the corresponding Edit icon, under the table's **Edit** column, to display the organization in Form Mode.

If the Organization screen is in Form Mode, click the **Search** option of the Block Toolbar and enter the search parameters and press [**Go**]. For details about the **Search** option, please refer to the *Searches and Table Filters and Sorts* section in the Getting Started reference guide.

For descriptions about the fields of each tab, please refer to the following sections that describe the fields on each tab.

Delete Organization

NOTE: An organization that has been made available to the other modules of Enterprise (e.g. Accounts Receivable and Accounts Payable) by setting the **Organization (Only)** flag on an organization's **Detail** tab to false, cannot be deleted through the Opportunity Management module.

If an organization's **Organization (Only)** flag is set to true, it can be deleted through the OM module. To delete such an organization, navigate to the **Organizations** option of the Treeview menu, following this path: **Opportunity Management** > **Organizations**. With the Organization screen in Table Mode, search for the organization using the **Query by Example** option on the Block Toolbar, as detailed by the sub-section *Search for Record* under the *Common Functionality* section of this reference guide. As shown by this section's first screenshot, click the entries corresponding selection area, just left of its corresponding Edit icon, and click [**Delete**] on the Block Toolbar. Then, click [**Yes**] on the confirmation window to perform the deletion.

If the Organization screen is in Form Mode, click [**Delete Record**] on the Block Toolbar, and then click [**Yes**] on the confirmation window to perform the deletion.

Organization – Section

The following table describes the fields on the **Organization** section of the screen:

Organization (Code)	Enter a code to represent the organization. For example, if your prospect's name is "Alcor Building Group" then perhaps the code would be ALCOR. Consideration of your company's standards (format) for Business Partners codes must be made as an organization will cease just being a prospect and become a Business Partner, shared throughout Enterprise, if the **Organization (Only)** flag is unchecked.
Name	Name of the prospective customer.
Legal Name	Full legal name of prospective customer.

Detail – Tab

The following table describes the fields on the **Detail** tab of the Organization screen:

Controlling Parent	Parent company of this organization.
AKA Organization Name	"Also Known As" name of organization.
Standard Address & Phone # Fields (several)	Organization's main address and phone # information.
Web Site	Relevant organization's web site.
Email	Relevant organization's email address
Previous Client	Indicates organization was a previous customer.
Current Client	Indicates organization is a current customer.
Customer	Indicates if this Organization record has been extended with a Customer record.
Vendor	Indicates if this Organization record has been extended with a Vendor record.

Organization (Only)	This flag determines if the organization is also available in other modules of CM*i*C Enterprise, such as Accounts Payable and Accounts Receivable, or if it only exists within the OM module. If it is checked, this organization is only available in the OM module. If this flag is unchecked at a later time and the record is saved, this organization will become available in the other modules of CM*i*C Enterprise; also, this flag becomes disabled and the organization cannot be deleted through the OM module. There is a flag, **OM Only Default**, on the OM System Option screen that controls whether this flag is checked or unchecked by default. This screen is reached through this standard Treeview path: *Opportunity Management > Setup > Company Control*, and by then clicking the [**System Options**] button. Refer to the *Set Up OM Module* section for details. Also, when the **Organization (Only)** flag is unchecked, the organization becomes a business partner and follows the registration code rule as per the **System Wide Unique Registration Code** flag located on the System Options screen in the System Data module (standard Treeview path: *System > Setup > System Options – Global tab*). If checked, the system will throw a validation message upon usage of same registration code. When unchecked, the system allows the user to create organizations with duplicate registration codes, but gives a soft warning in a pop-up, informing the user with a list of business partners with duplicate registration codes.
Top X Account	Indicates organization is one of the top sources of revenue.
Active Flag	Indicates current, active dealings with organization.
National Account	Indicates organization is a National Account.
Source	Marketing campaign and or source of the prospect. The available options for this field are maintained by the Sources maintenance screen (standard Treeview path: *Opportunity Management > Setup > Sources*).
Class	If organization is a vendor, select the Vendor Class to which it belongs. Maintenance screen's standard Treeview path: *Accounts Payable > Setup > Global Tables > Vendor Class Codes*.
Registration	This field may be required if this organization is a vendor, such as an independent contractor, from which services or products are purchased, and your company wants their tax registration number entered in the OM module. In the US, this number is a Taxpayer Identification Number (TIN). If, however, the vendor is an independent contractor whose TIN is his or her Social Security Number, then this TIN number is specifically a Social Security Number (SSN). To indicate that this TIN number is specifically an SSN, the **SSN** flag is checked. If the **SSN** flag is not checked, this number is a TIN number, if it is, this number is an SSN number. This number is required on 1099 tax forms. In Canada, this field is used for the GST/HST Registration Number.
1099	If this organization is an independent contractor whose services need to be reported on 1099-MISC tax forms (USA only), enter the code that most applies to them here.
Legal Entity	Legal Entity category.
SSN	The **SSN** checkbox indicates what type of tax number the **Registration** field is. When this checkbox is checked, the number in the Registration field this the vendor's SSN number (individual) not TIN number. If unchecked, the number in the Registration field this the vendor's TIN number.
Ethics Policy	Not standard. Disregard if not used by your company.

Company Types – Section

The **Company Types** section contains a table that lists the company types that apply to the organization (business partner, vendor, independent contractor).

To add a company type, click the [**Insert Record**] button on the corresponding Block Toolbar. To delete an entry, select its correspond row and click the [**Delete Record**] button.

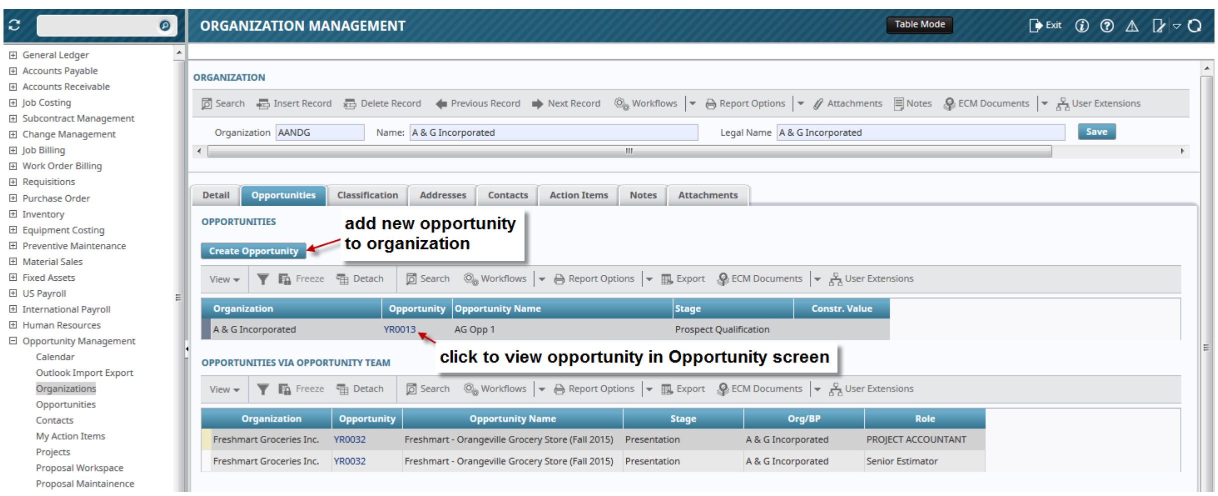
Market Sectors – Section

The **Market Sectors** section contains a table that lists the market sectors that apply to the organization.

The following table describes the column headers of the Market Sectors table for this opportunity.

Ctrl. Market Sector	Name of market sector's group. When the group is selected from this field, its market sector types will be available in the corresponding **Name** field. The maintenance screen for market sector groups and their types is found through the following standard path: **Opportunity Management** > **Setup** > **Opportunity Market Sector**.
Name	Particular market sector type, belonging to a particular market sector group. The group is chosen from the **Ctr. Market Sector** field. The values available in this drop-down are dependent on the value chosen for the **Ctrl. Market Sector** field.

Opportunities – Tab



This tab displays the opportunities available for the displayed organization. It also displays any opportunity not offered by this organization that has its personnel involved with the opportunity, as external key players.

Opportunities – Section

The **Opportunities** section lists all opportunities offered by the organization (customer). It also allows you to create a new opportunity, by just clicking the [**Create Opportunity**] button, and view the details of an opportunity, by clicking an opportunity's corresponding code (shown above). For details about adding an opportunity, and descriptions about its fields, please refer to the *Opportunities* section of this reference guide.

The following are descriptions about the fields for this section's table, which lists the opportunities available for the organization:

Organization	Organization for which opportunity is available.
Opportunity	Opportunity code for the opportunity.
Opportunity Name	Opportunity's name.
Stage	Current sales stage of opportunity; maintenance screen: **Opportunity Management** > **Setup** > **Sales Stages**; refer to the *Sales Stages sub*section under *Set Up OM Module* for details about setting up Sales Stages.
Constr. Value	Construction value of project associated with opportunity.

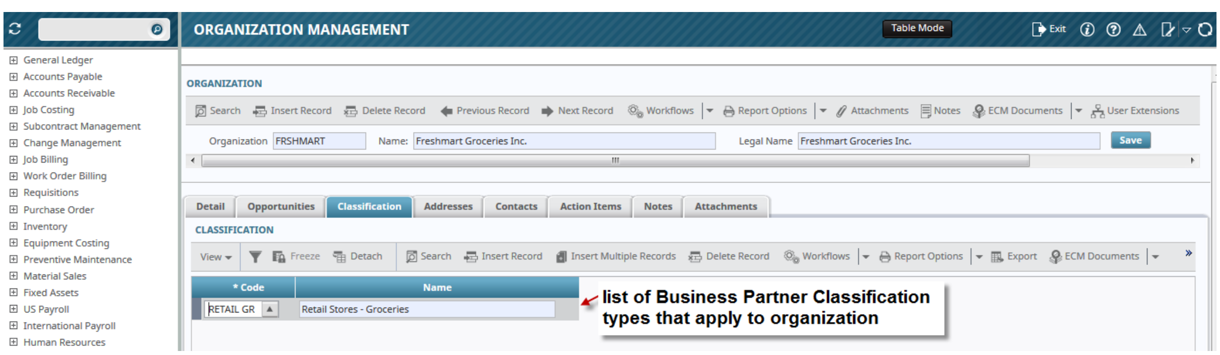
Opportunities via Opportunity Team Section

This section displays all opportunity team roles that are performed by employees belonging to this organization, for an opportunity that is not offered by this organization. In other words, this section displays all external opportunity team roles performed by employees of this organization, for an opportunity that is not offered by this organization. Opportunity team members are also known as key players.

The following are descriptions about the fields for this section's table, listing external opportunity team roles performed by this organization's:

Organization	Organization for which opportunity is available.
Opportunity	Opportunity code for the opportunity.
Opportunity Name	Opportunity's name.
Stage	Current sales stage of opportunity; maintenance screen: **Opportunity Management** > **Setup** > **Sales Stages**; refer to the *Sales Stages sub*section under *Set Up OM Module* for details about setting up Sales Stages.
Org/BP	Organization that employee performing a role in the opportunity team belongs.
Role	Role in the opportunity team that is performed by an employee that belongs to organization specified by the **Org/BP** field.

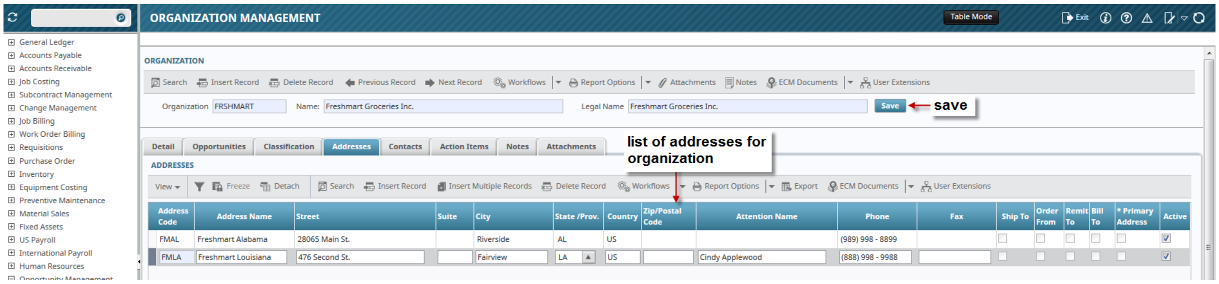
Classification – Tab



The **Classification** tab lists the Business Partner Classification types that apply to the organization.

The maintenance screen for these values is reached through the following standard path: **Accounts Receivable** > **Setup** > **Global Tables** > **BP Classification Codes**.

Addresses – Tab



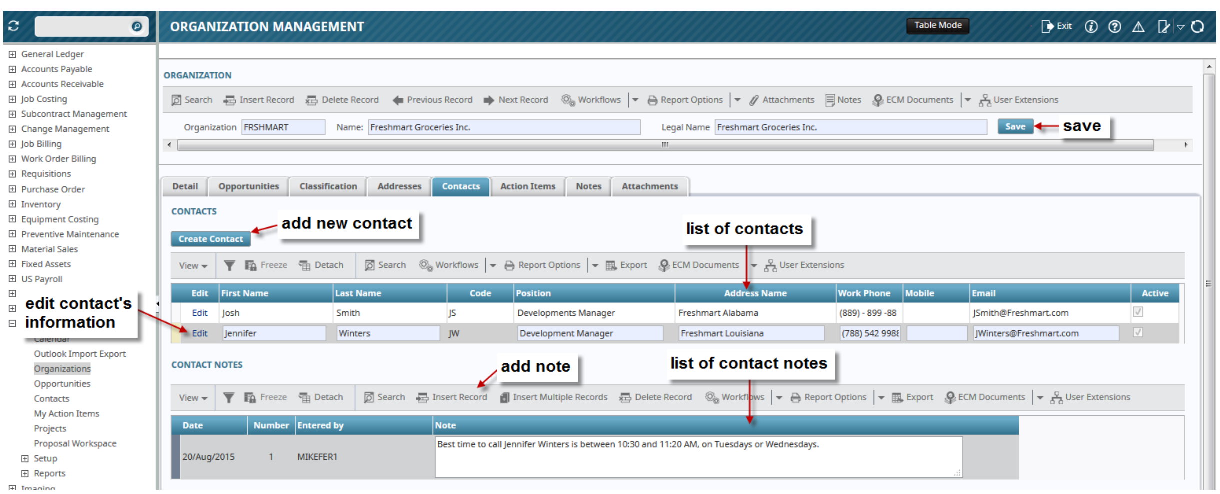
This tab is used to create an Address record (object), identified by a code and name. An Address record created here can then be selected from a list of values when selecting a contact's address. Also, to handle distributed organizations, which have multiple locations, this tab allows the entry of multiple addresses.

To add a new address, click the Block Toolbar's [**Insert Record**] button, and enter its information. When finished, click the Main Toolbar's [**Save**] button.

The following are descriptions for the non-standard fields on this screen.

Address Code	Code to identify particular address of a distributed organization.
Address Name	Name of Address record.
Attention Name	Name of person receiving mail/shipment.
Primary Address	Flag indicating if address is the organization's primary address.
Active	Indicates if address is active/current.

Contacts – Tab



This tab is used to add contacts to an organization record. The options on this tab to create or edit a contact launch the Contact screen. This is the same screen that is launched through the Treeview menu.

For details about the fields on a Contact screen (application), used for the following operations, please refer to the *Contacts* section of this reference guide.

Add a Contact

To add a contact, click the [**Create Contact**] button, under the **Contacts** section. This launches the standard Contact screen used throughout the Opportunities Management module.

View Contact Details

To view a contact's details, click the corresponding "**Edit**" text under the **Edit** column, as shown in the above screenshot. This brings up the Contacts screen, displaying further information.

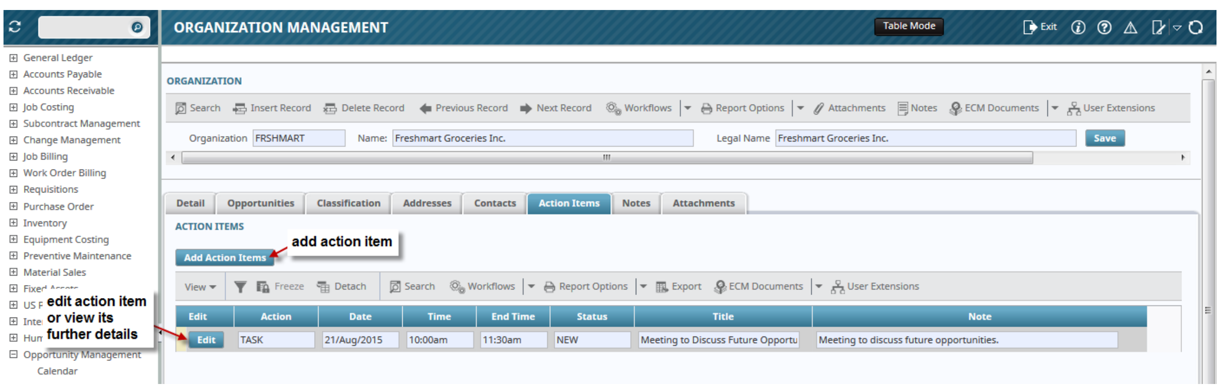
Edit Contact

To edit a contact's details, click the corresponding "**Edit**" text under the **Edit** column, as shown in the above screenshot. This brings up the Contacts screen. Edit the fields as necessary and click the [**Save**] button.

Inactivate an Existing Contact

To inactivate a contact, click the corresponding "**Edit**" text under the **Edit** column, as shown in the above screenshot. On the Contact screen, click [**Inactivate Contact**]. The system will then ask you to confirm the inactivation. Click [**Yes**] and the contact will be inactivated, otherwise click [**No**] to abort.

Action Items – Tab



This tab lists the action items entered against an organization, and they are more relevant to the organization than to the opportunities being pursued with the organization.

For details about the fields of action items, and about the My Action Items screen that is launched when performing the following operations, please refer to the *My Action Items* section of this reference guide.

Add Action Item

To add an action item, click the [**Add Action Items**] button, as shown in the above screenshot. This brings up the standard My Action Item screen used throughout the Opportunity Management module.

When an action item is added, it will be added to the calendar displayed by the Calendar screen.

Edit or View Details of Action Item

To view or edit an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen that displays the details of the action item for viewing or editing. If any changes are made, click the Main Toolbar's [**Save**] button to save the changes.

Delete Action Item

To delete an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen. In the My Action Item screen, click the [**Delete**] button.

Notes – Tab & Toolbar

This tab displays notes entered for the organization. If there are any associated notes, the **Notes** option on the Block Toolbar will indicate how many.

For details about this tab, which is common to various screens of the Opportunity Management module, please refer to the *Notes Tab* sub-section of the *Common Icons & Functionality* section in this reference guide.

Attachments – Tab & Toolbar

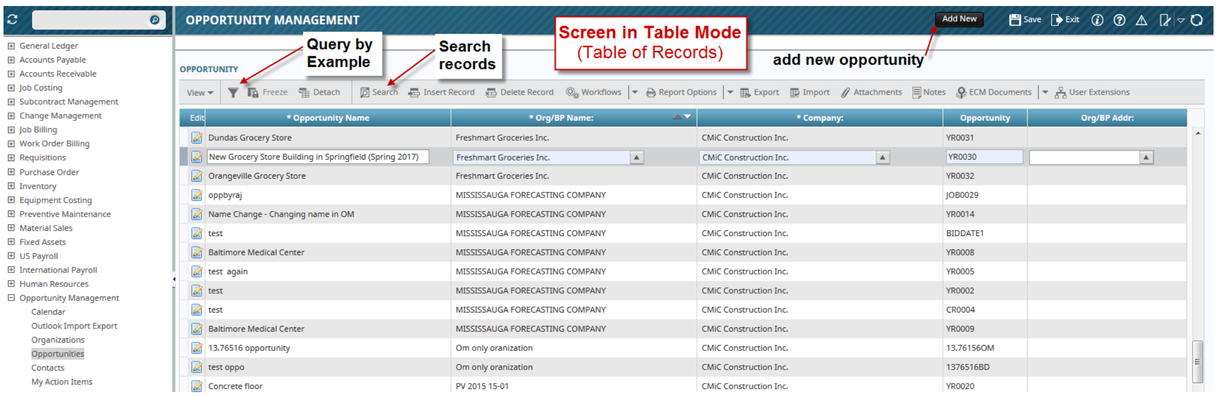
This tab displays attachments added to this organization record. If there are any added attachments, the **Attachments** option on the Block Toolbar will indicate how many.

NOTE: Attachments added to any record that is associated with this organization can be added to this organization using the [**Insert Record**] button (on **Attachments** tab).

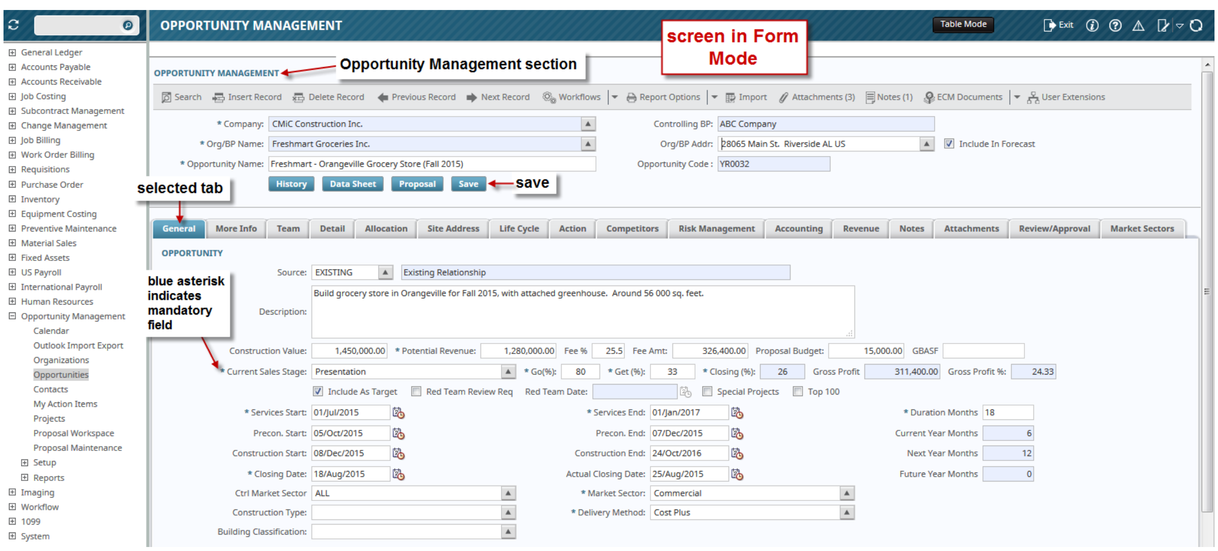
For details about this tab, which is common to various screens of the Opportunity Management module, please refer to the *Attachments Tab* sub-section of the *Common Icons & Functionality* section in this reference guide.

Opportunities

Overview – Opportunities



Sample of Opportunity screen in Table Mode, listing opportunities; Standard path: ***Opportunity Management*** *>* ***Opportunities***



Sample of Opportunity screen in Form Mode.

An opportunity is a sales prospect associated with a potential customer (organization). The stage in which a potential sale is entered into the Opportunity Management (**OM**) module as an Opportunity object, varies from company to company. An Opportunity can be created for a potential sale when it is just an initial sales lead, after a lead has been determined to be reasonably feasible, after your company has accepted an invitation to bid, or, if your company sells products, after initial interest in a product has been shown.

In the OM module, the creation of an Opportunity object will trigger the automatic creation of a Project object, which is relevant to the project management tasks of the Project Management module. Also, the creation of an Opportunity will trigger the creation of a Bid Job object and associate it to the Opportunity and Project objects if the **Automatically Create Bid Job** flag is checked in the Company Control screen (**Opportunity Management** > **Setup** > **Company Control**). If need be, you can also link an existing Job object to the Opportunity and Project objects.

A Bid Job is a potential job, and it is relevant in the OM and Job Costing modules. If a bid job is won, it becomes a Job object, relevant in both the Job Costing and Job Billing modules. A Bid Job is used to build the bid/estimate information, so that when the bid is won, the data is ready to go. It can also be used to track the costs of acquiring the opportunity, and if a bid has been won, there is the option of transferring the pre-contract costs to the Job object.

Opportunities can be viewed, added or edited in two ways, via the **Opportunity** tab in the Organization screen, or through the Opportunity option of the Treeview menu.

NOTE: Due to customizations, the data fields on the screens of Opportunity Management may vary.

Add New Opportunity

Ensure Opportunity is Not Already in System

First, it is necessary to ensure that the opportunity about to be entered is not already in the system so that you do not duplicate already existing data. This is necessary for avoiding issues that arise out of administrators working with different records, and to ensure that you do not miss any important information in any existing records. Refer to the sub-section *Search for Record* under the *Common Functionality* section for instructions on how to search for a record, to ensure that it does not already exist. Alternatively, and this could arguably be considered the best practice, use the systems De-duplication Searching Function.

De-duplication Searching Function

The OM module has a backend process that can be enabled to greatly reduce unintended duplications. The flag to enable this option is labeled **De-duplication Searching Function**, and it is found on the Company Control (OM Control File) screen under System Options. For details about this option, please refer to the *System Options* sub-section in this reference guide, under the *Set Up OM Module* section, then under the *Company Control* subsection. The relevant sub-sections under the *System Options* section are: *Enable De-duplication Searching Function* and *De-Duplication Searching Function – Parameter List*.

Proposal Workspace & Detailing New Opportunity

To help you fill in the details of a new Opportunity more accurately and comprehensively, right from the start, consider using Proposal Workspace (see *Proposal Workspace* section in this user guide for details). Proposal Workspace is used to compile a list of similar Opportunities and a list of Key Players that have relevant experience and skills, to most effectively manage the opportunity. The listed Opportunities and Key Players can then be referenced to detail the new Opportunity and compiling its Key Players in a more informed manner.

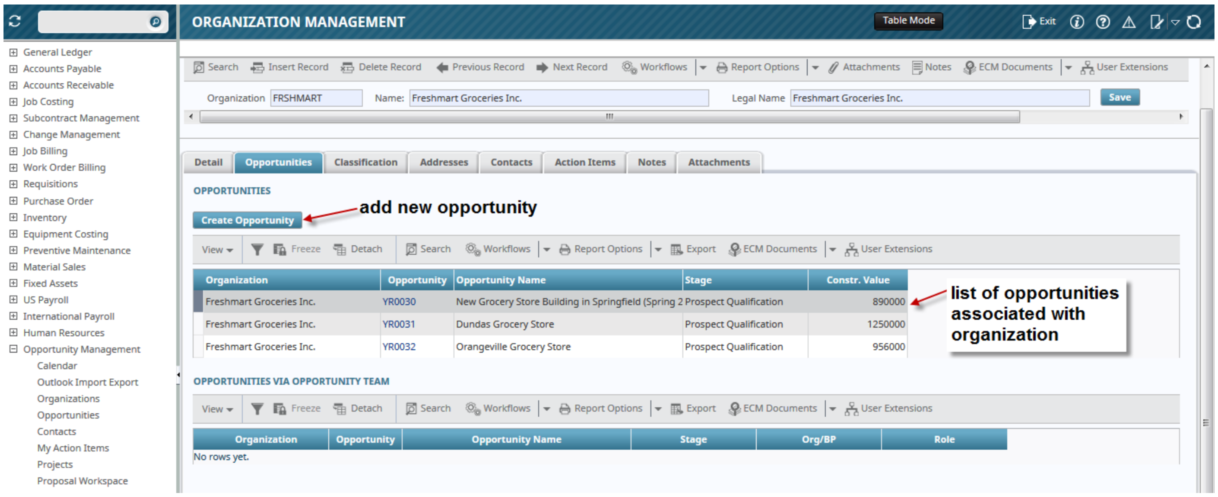
Option 1: Create New Opportunity through Opportunity Screen

NOTE: If the **Enable De-duplication Searching Function** flag is checked, new entries of Organization, Opportunity, and Contact records can only be made when the screens to enter them are in Form Mode. This is necessary to prevent multiple records being saved at the same time, which cannot be handled by the De-duplication Searching function.

When the Opportunity screen is in Table Mode, you can use the [**Add New**] button on the Main Toolbar, as shown in this section's first screenshot. If the Opportunity screen is in Form Mode, you can use the Block Toolbar's [**Insert Record**] option, as shown in this section's second screenshot.

Fill in the necessary details, using the descriptions for each field on each tab that is provide by the following sections. Click [**Save**] when finished.

Option 2: Create New Opportunity through Organization Screen



Sample of an Organization screen in Form Mode, displaying the Opportunity tab, which lists opportunities associated with the displayed organization.

When the Organization screen is in Form Mode and displaying the organization for which the opportunity is available, you can use the [**Create Opportunity**] button on the **Opportunity** tab, as shown in the above screen. This will launch the Opportunities screen, and the new opportunity will automatically be associated with its organization.

Fill in the necessary details, using the descriptions for each field on each tab that is provided in the following sections. Click [**Save**] when finished.

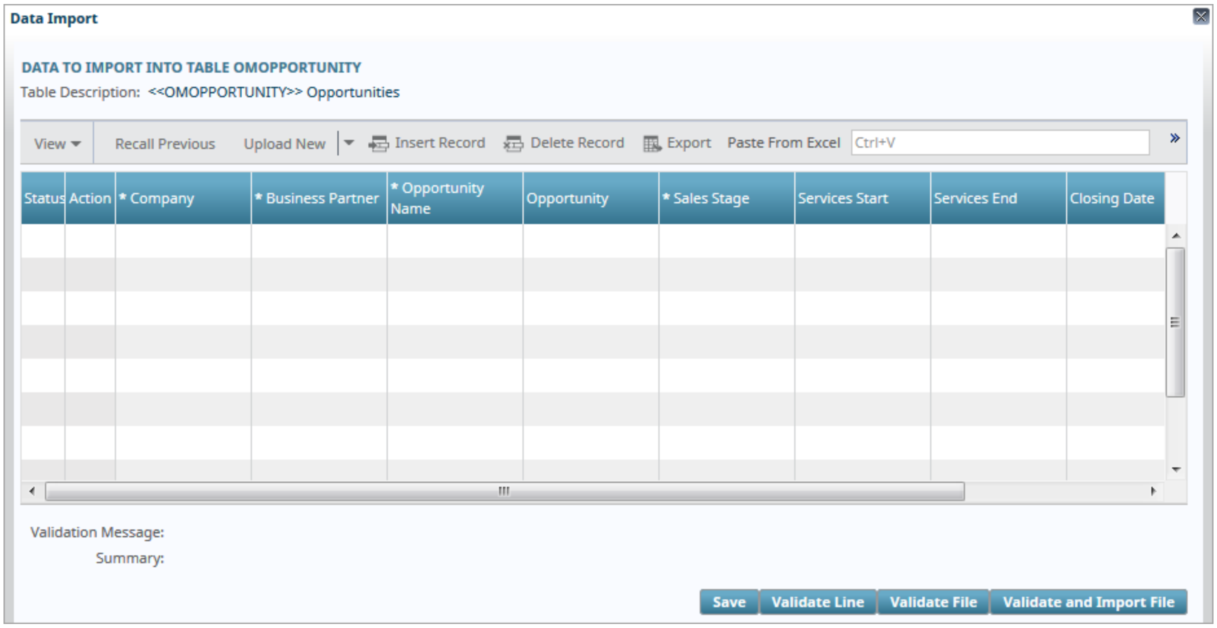
Opportunity Management – Section

The following table describes the fields on the **Opportunity Management** section of this screen:

Company	Company to which the user who created this opportunity belongs. When a user creates an opportunity, the company associated to the user's User ID is automatically filled in, for this field.
Controlling BP	Controlling parent company of company providing this opportunity.
Org/BP Name	Name of organization (business partner) providing this opportunity.
Org/BP Addr	Address of organization (business partner) providing this opportunity.
Opportunity Name	Name to identify this opportunity record.
Opportunity Code	Code to identify this opportunity record. If the **Automatic Opportunity Numbering** flag is set, with a specified prefix, this code is automatically generated. If not, you can enter a code. The flag is found on the Company Control (OM Control File) screen, under Setup: **Opportunity Management** > **Setup** > **Company Control**.

Include In Forecast	Indicates whether or not to include this opportunity in the sales forecast reports of the OM module. It is also used as a parameter for various OM reports.

[**Import**] – Block Toolbar Button



Sample of Import popup.

The 

button on this section's Block Toolbar is used to import opportunities from a spreadsheet.

Create Template

To create a template, click the [**Upload New**] button's down-arrow ( ), and select **Download CSV Template**.

Import Opportunities

There are two ways to import opportunities:

1. Copy desired opportunities to import from an open spreadsheet (standard copy functionality, i.e. **Ctrl** + **C** keyboard keys), without copying the column headers, and paste the data into the **Paste From Excel** field of the Import popup.

2. Click the [**Upload New**] button (not the down-arrow), and in the popup, click [**Browse…**] to search for and select the CSV file with the opportunities to import.

[**History**] – Button

Each time an opportunity record is changed and saved, the previous version of the record gets saved. This button brings up the Opportunity History screen, which lists the records for this opportunity, as they were before being changed.

[**Data Sheet**] – Button

An opportunity's data sheet is used to keep additional, user defined information about an opportunity, which can include information about an opportunity's associated bid job, job, and project. The data sheet is composed of user defined groups (sections), and these groups contain user defined fields.

For instance, there could be a section to track project attributes. This section can be broken down by industry type, and each type could contain industry specific attributes. More specifically, you could have sections for educational, commercial, and medical industry types, which contain project attributes specific to the industry types.

Furthermore, the groups and fields on an opportunity's data sheet can be made available or unavailable, depending on the opportunity's data fields and on user defined conditions. For instance, the Opportunity data sheet can be configured so that an opportunity that has its **Market Sector** field set to "**Commercial**" will only have industry-specific sections on its data sheet that are relevant to the Commercial type.

For instructions on setting up the data sheet for Opportunity objects (records), please refer to the *Data Sheet Set Up* section in this reference guide.

[**Proposal**] – Button

This button launches the Proposal Workspace screen. For details, please refer to the *Proposal Workspace* section of this guide.

General – Tab

The following table describes the fields on the **General** tab, which displays details about the opportunity:

Source	Source of opportunity. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Sources**.
Description	As mentioned in the *Overview – Opportunities* section, when an Opportunity object is created, an associated Project object is also created. This field is the description of the opportunity, and the description entered here will be copied to the corresponding description field of the associated project. This field is updatable through the corresponding project, through the Project Management module.
Construction Value	Enter the construction value.
Potential Revenue	Projected revenue amount for this opportunity. If the **Opportunities In Thousands** flag is checked, do not enter the 3 trailing zeros "000" to identify thousands. The flag is found in the Company Control screen, under Setup (standard path: **Opportunity Management** > **Setup** > **Company Control)**.
Fee %	Enter the percentage for the Management/Contract Fee, or optionally, enter the amount of this fee in the **Fee Amt** field. If this field is used, the **Fee Amt** field will be automatically calculated, using either of two methods, as detailed below. The **Fee Amt** field is updated once this field loses focus.

Fee Amt	Option 1: If <u>not</u> using the **Fee %** field, enter the actual amount of the Management/Contract Fee in this field. Option 2: If using the **Fee %** field, this field is automatically calculated, in either of two ways. The method is determined by the **Fee Calculation Method** field, found on the **Company Control** screen (**Opportunity Management** > **Setup** > **Company Control**). The following are the two formulas used to fill in the **Fee Amt** field, based on the following two values of the **Fee Calculation Method** field: 1) **Percentage of Contract**: **Fee Amt** = **Potential Revenue** x **Fee %** 2) **Percentage of Cost**: **Fee Amt** = (**Potential Revenue x Fee %) / (1 + Fee %)**
Proposal Budget	Amount budgeted for proposal.
GBASF	**Gross building area square footage**
Current Sales Stage	Current stage in the sales phase. When the sales stage is changed and saved, a new entry is saved in the **Sales Stage History** table, on the **Life Cycle** tab, recording the new stage and the date for which the new stage was selected. The LOVs for this field is maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Sales Stages**; refer to the *Sales Stages sub*section under *Set Up OM Module* for details about setting up Sales Stages.
Go (%)	Project odds: chance of project becoming a reality.
Get (%)	Chance of winning opportunity. Automatically populated by the **Percent of Closing** field of the **Sales Stage** entered for the Opportunity, if this field was entered for the Sales Stage. Note, this field's pre-populated value can be overwritten.
Closing (%)	Calculated value, based on following fields and calculation: **Go (%) x Get (%) / 100**
Gross Profit	Calculated amount based on following fields and calculation: **Fee Amt - Proposal Budget**
Gross Profit (%)	Calculated percentage based on following fields and calculation: **Gross Profit / Potential Revenue**
Include As Target	Check to include this opportunity in Opportunity Management Reports that require this flag to be checked, such as: Risk Report and Needs Report.
Red Team Review Req	If applicable, check to indicate opportunity needs to be reviewed by a Red Team member.
Red Team Date	If **Red Team Review Req** flag is checked, this field becomes enabled. Date by when opportunity must have been reviewed by a Red Team member.
Special Projects	Indicates project associated to this opportunity is a Special Project.
Top 100	Indicates opportunity would rank in the top 100, in terms of revenue.
Services Start	Enter date services start. Services start and end dates encompass all services, from the very beginning to the very end of the project associated with this opportunity.
Services End	Enter date services end.
Duration Months	Number of months from **Services Start** to **Services End**. NOTE: If date entered for **Services Start** and number of months specified in **Duration Months** field, **Services End** date is filled in automatically. Also, to change **Services End** field, clear **Duration Months** field first.
Precon. Start	Enter start date for preconstruction phase.
Precon. End	Enter end date for preconstruction phase.

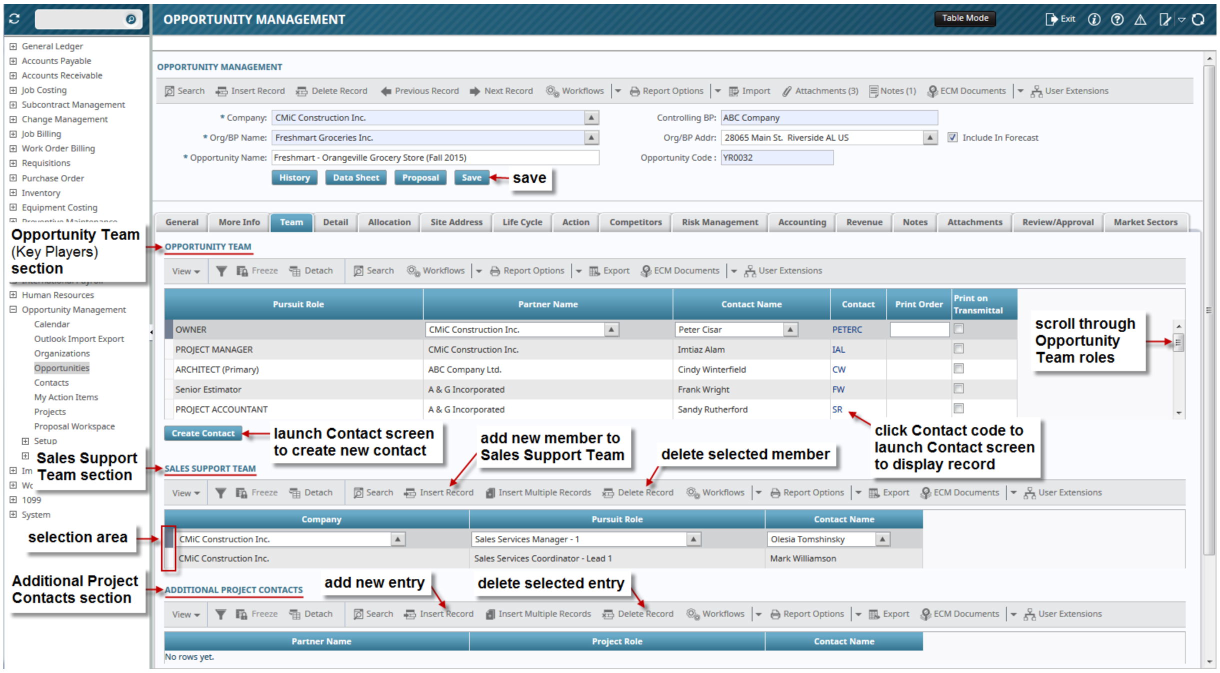
Current Year Months	Number of months in the current year, for the date range specified by the fields, **Services Start** and **Services End**.
Construction Start	Date construction starts.
Construction End	Date construction ends.
Next Year Months	Number of months in the next year, for the date range specified by the fields, **Services Start** and **Services End**.
Closing Date	Select or enter the award date of the bid.
Actual Closing Date	This date will be populated automatically when this opportunity's corresponding bid job is indicated as being won through the Win/Lose Bid process. This field may, however, be entered manually if this opportunity was not processed through the standard Bid Job then Win/Lose Bid process, for historical purposes.
Future Year Months	Number of months in the year(s) after next year, for the date range specified by the fields, **Services Start** and **Services End**.
Ctrl Market Sector	Whether or not submarket sectors are used is set by the **Submarket** flag on the OM Control File screen (see the *Configure OM Module for Company* section, under *Set Up OM Module*, in this reference guide for details). If checked, the **Ctrl Market Sector** and **Market Sector** fields are both used, with the **Market Sector** field being the submarket sector; otherwise, the **Ctrl Market Sector** field is irrelevant and set to "**ALL**", and just the **Market Sector** field is used to select a market sector. If the **Submarket** flag is checked, this field is the general market sector for the market sector selected by the **Market Sector** field. When a value is selected from this field, its submarket sectors will be available in the **Market Sector** field. The maintenance screen for market sector groups and their types is found through the following standard path: **Opportunity Management** > **Setup** > **Opportunity Market Sector** (refer to *Opportunity Market Sector* section under *Set Up OM Module* for details**)**. **NOTE**: Additional market sectors can be entered for the Opportunity using the **Market Sectors** tab.
Market Sector	As detailed above, if the **Submarket** flag on the OM Control File screen is checked, this field is the submarket sector belonging to market sector group selected via the **Ctr. Market Sector** field, and the values available in this drop-down are dependent on the value chosen for the **Ctrl. Market Sector** field. Otherwise, submarket sectors are not used, the **Ctrl. Market Sector** field is irrelevant, and only this field is used to select a market sectors.
Construction Type	Project's construction type. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Construction Types**.
Delivery Method	Select the delivery method (contract type). List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Contract Types**.
Building Classification	Classification of building to be constructed. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Building Classifications**.

More Info – Tab

The **More Info** tab displays additional information about the opportunity, as detailed in the fields below:

Internal Bond	Indicates Internal Bond, with respect to Risk Management information.
CDI	Indicates Contractor Default Insurance (CDI) for a project's risk management. A corresponding field, **CDI Volume**, is on the **Risk Management** tab.
Apt. or Condo (Residential)	Indicate if project involves an apartment or condominium (residential building).
Builder's Risk By	Select Builder's Risk By value from list. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Builders Risk By**
Who is Prime?	Select company from list of organizations (business partners).
Partnership Type	Enter partnership type.
Workers Company	Enter the Workers Compensation Company.
Workers Comp Rate	Enter the rate for the Workers Compensation Company.
Contact Name	Enter contact name.
Gen Liabil Code	Enter General Liability Code for this opportunity.
Gen Liabil Rate	Enter General Liability Rate for this opportunity.
Controlling Project	Controlling project, which contains project associated to this opportunity.
Proposal Code	Enter Proposal Code associated with this opportunity.
Sales Rep Company	Select company to which sales representative belongs. The company selected in this field determines what sales representatives will be available in the **Sales Rep** field. Only contacts that belong to the selected company and are assigned the role **Sales** will be available in the **Sales Rep** field.
Sales Rep	Select sales representative. This list displays all contacts that are assigned the role **Sales** **(Role** field on Contact screen's **Contacts** section**)** and belong to the company selected in the **Sales Rep Company** field.
Project Company	Company handling the project associated with this opportunity.
Project	Project code associated with this opportunity.
Controlling Project	Description of controlling project, which contains project associated to this opportunity.
Proj Bid Won Lost Date	This date will be populated automatically when this opportunity's corresponding bid job is indicated as being won through the Win/Lose Bid process. This field may, however, be entered manually if this opportunity was not processed through the standard Bid Job then Win/Lose Bid process, for historical purposes.
Fax	Enter relevant fax number.

Team – Tab



The **Team** tab is comprised of three sections, as shown in the above screenshot.

Opportunity Team (Key Players) – Section

The **Opportunity Team** section is used to compile the team to manage the opportunity, its bid, and then its associated project. The members of this team are also known as an opportunity's Key Players.

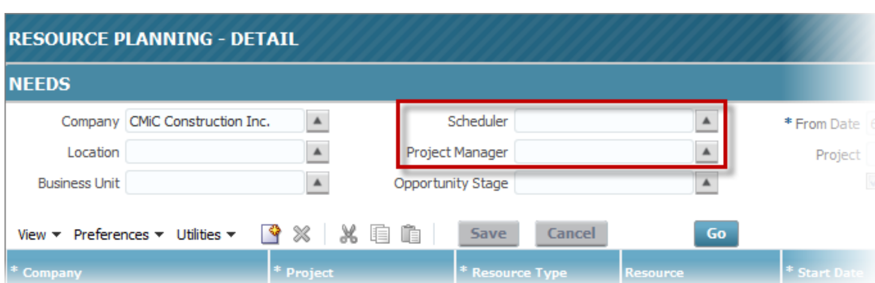
To aid the compilation of an effective Key Player team, consider using Proposal Workspace, explained in the following section (*Proposal Workspace & Compiling List of Key Players*).

Be sure to click [**Save**] to save any entries or changes.

Maintenance Screen for Project Management Roles

Standard Treeview path: **Job Costing** > **Setup** > **Local Tables** > **Project Management Roles**

Standard Key Player Roles



Sample of Resource Planning's Detail screen.

In the Resource Planning module, the **Project Manager** and **Scheduler** roles are used for resource management tasks. In order for the application to identify these roles, the codes used to identify these roles must be entered as the following:

Standard Key Player Role	Code for Project Management Role
Project Manager	MNGR
Scheduler	SCHEDULER

Proposal Workspace & Compiling List of Key Players

To help you compile a list of potential Key Players that have relevant experience and skills, to most effectively manage the opportunity, consider using Proposal Workspace (see *Proposal Workspace* section in this user guide for details). The compiled list of potential Key Players can then be shortened until the final list is attained.

A suitably experienced management team is much better suited to identify hidden risks and potential issues that can arise out of factors that are unique to an opportunity of a particular market sector, which can be quite important for such tasks as budgeting and risk management.

Section's Table & Buttons

[Create Contact] – Button

To create a new contact, click [**Create Contact**], which launches the Contact screen (see *Contacts* section for details).

The following table provides details about the column headers of this section's table:

Pursuit Role	Role of opportunity team member. Maintenance screen's standard Treeview path: **Job Costing** > **Setup** > **Local Tables** > **Project Management Roles**; note, only entries that have the **Key Player** field checked show up as defaults for the Opportunity Team table.
Partner Name	Company or business partner to which member belongs. The company or business partner selected in this field determines what contacts will be available in the **Contact Name** field. Only contacts that belong to the selected company will be available in the **Contact Name** field.
Contact Name	Person (contact) performing the **Pursuit Role**, which belongs to the company selected by the **Partner Name** field. The contacts available in this list are associated to the organization selected by the **Partner Name** field.
Contact	Contact code, which is a hyperlink that launches the Contact screen to display the contact's Contact record.
Printing Order	Order in which entry is printed.
Print on Transmittal	Indicates if entry is printed on transmittal.

Sales Support Team – Section

This section lists all the members of the Sales Support Team. Note, the Sales Support Team does have to be comprised of employees from only your own company, it can contain members from consulting companies or strategic alliance partners.

To add a new member, click the [**Insert Record**] button on the corresponding Block Toolbar.

To delete a member, select the corresponding row, in the selection area (framed by red rectangle), and click the [**Delete Record**] button.

The following table describes the column headers of the Sales Support Team table for this opportunity:

Company	Company to which member belongs. The company selected in this field determines what contacts will be available in the **Contact Name** field. Only contacts that belong to the selected company will be available in the **Contact Name** field.
Pursuit Role	Role of Sales Support Team member. Maintenance screen: **Opportunity Management > Setup > Positions**.
Contact Name	This list displays all contacts that are associated to the company selected in the **Company** field.

Additional Project Contacts – Section

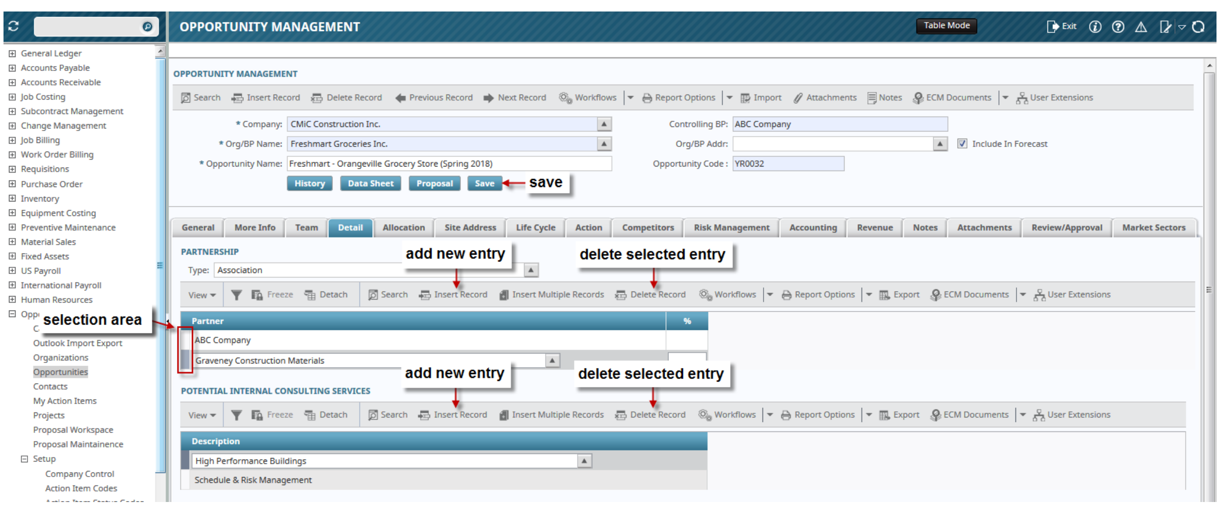
This section lists all of the additional Contacts for this Opportunity and its associated Project.

To add a new member, click the [**Insert Record**] button on the corresponding Block Toolbar. To delete a member, select the corresponding row, in the selection area (framed by red rectangle), and click the [**Delete Record**] button.

The following table describes the column headers of the Additional Project Contacts table for this opportunity:

Partner Name	Company or business partner to which member belongs. The company or business partner selected in this field determines what contacts will be available in the **Contact Name** field. Only contacts that belong to the selected company will be available in the **Contact Name** field.
Pursuit Role	Role of contact.
Contact Name	This list displays all contacts that are associated to the company or business partner selected in the **Partner Name** field.

Detail – Tab



The **Detail** tab is comprised of two sections: **Partnership** and **Potential Internal Consulting Services**.

Partnership – Section

In the **Partnership** section, select the partnership type using the **Type** drop-down list.

List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Partner Types**.

To add a partnership, click the [**Insert Record**] button on the corresponding Block Toolbar, as shown in the above screenshot. To delete an entry, select its corresponding row in the selection area (framed by red rectangle), and click the [**Delete Record**] button.

The following table describes the column headers of the Partnership table for this opportunity:

Partner	Select the company or business partner with which your company has a partnership.
%	Enter the relevant percentage, if necessary.

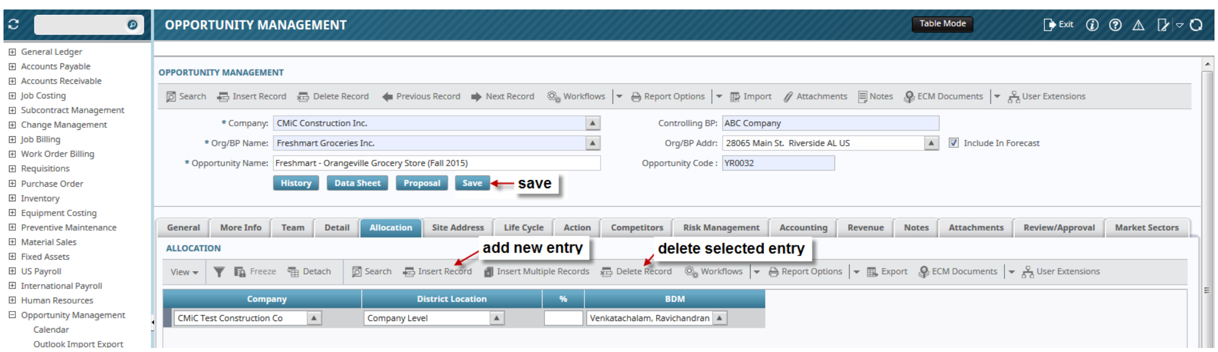
Potential Internal Consulting Services – Section

In the **Potential Internal Consulting Services** section, select the partnership type using the **Type** drop-down list.

List of Values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Consulting Services**.

To add an entry, click the [**Insert Record**] button on the corresponding Block Toolbar, as shown in the above screenshot. To delete an entry, select its correspond row and click the [**Delete Record**] button.

Allocation – Tab



The **Allocation** tab is used to display and enter an opportunity's Business Development Manager information.

To add an entry, click the [**Insert Record**] button on the corresponding Block Toolbar, as shown in the above screenshot. To delete an entry, select its correspond row and click the [**Delete Record**] button.

The following table describes the column headers of the Allocation table for this opportunity:

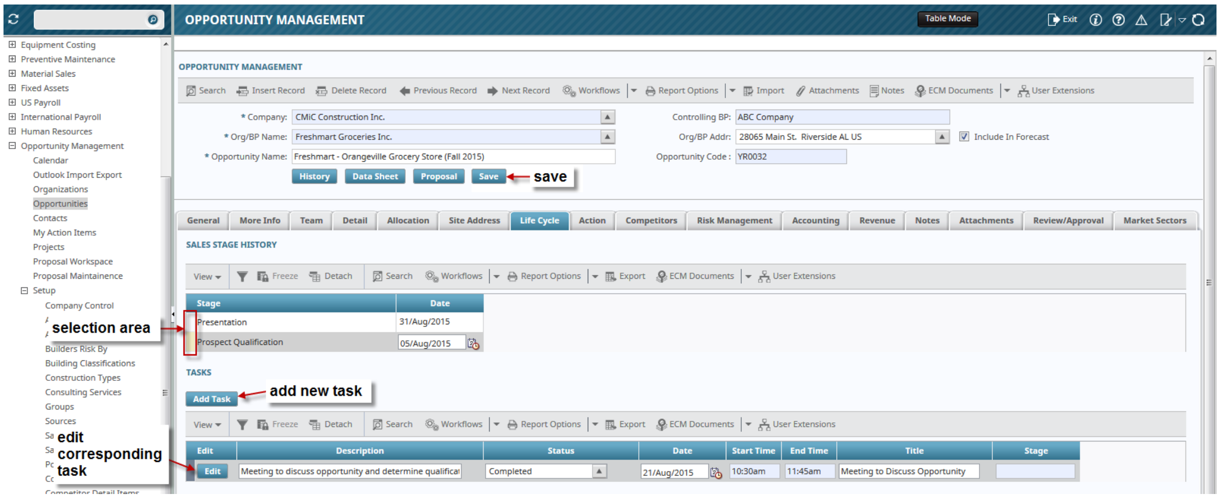
Company	Select company from the list.
District Location	Select department from the list. Maintenance screen: **General Ledger > Setup > Local Tables > Maintain Departments**.
%	Enter the relevant percentage, if necessary.
BDM	Business Development Manager

Site Address – Tab

This tab displays the site address for the opportunity. The address entered here gets copied to the corresponding project.

Enter the standard address information. Any edits to the address here will also be made to the corresponding project.

Life Cycle – Tab



The **Life Cycle** tab is comprised of two related sections: **Sales Stage History** and **Tasks**.

Sales Stage History – Section

This section lists all of the sales stages that the Opportunity has entered against it. When a new sales stage is selected and saved, using the **Current Sales Stage** field on the **General** tab, a new entry is saved in this section's **Sales Stage History** table. The saved entry tracks the new sales stage and the date for which it was selected.

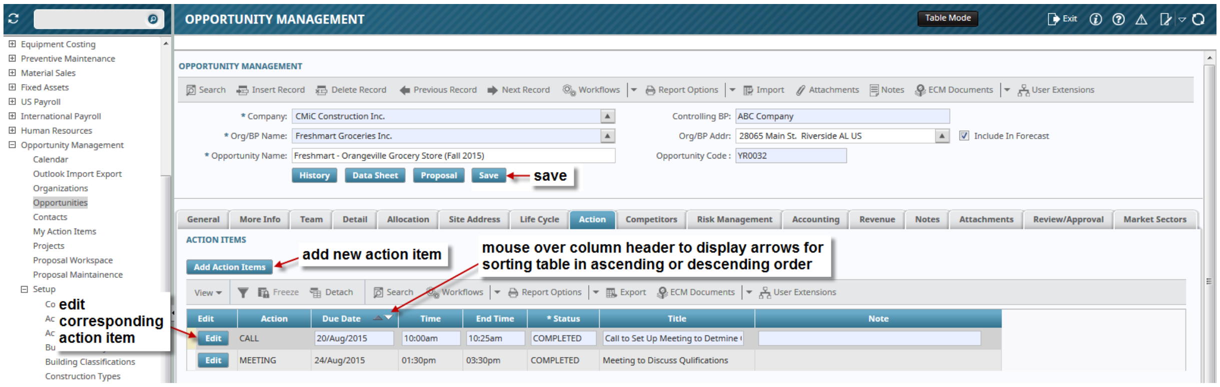
The dates are editable, but the entry of records into this **Sales Stage History** table is determined by the **Current Sales Stage** field on the **General** tab, as previously described.

Tasks – Section

This section lists all of the tasks associated with the opportunity's sales stage. The tasks in this section are a particular type of Action Item. These tasks are action items of the type "**Task – Sales Stage Task Action**", and all action items added here have their **Action** field (indicating action's type) set to this type.

To add a Sales Stage Task Action, click the [**Add Task**] button, as shown in the above screenshot. To edit a task, click the task's corresponding [**Edit]** button. Both of these options launch the Action Item screen. For details about the Action Item screen (application), please refer to the *My Action Item* section of this reference guide.

Action – Tab



The **Action** tab displays the action items scheduled to win the opportunity. For details about the fields of action items, and about the My Action Items screen that is launched when performing the following operations, please refer to the *My Action Items* section of this reference guide.

Add Action Item

To add an action item, click the [**Add Action Items**] button, as shown in the above screenshot. This brings up the standard My Action Item screen used throughout the Opportunity Manger module.

When an action item is added, it will be added to the calendar displayed by the Calendar screen.

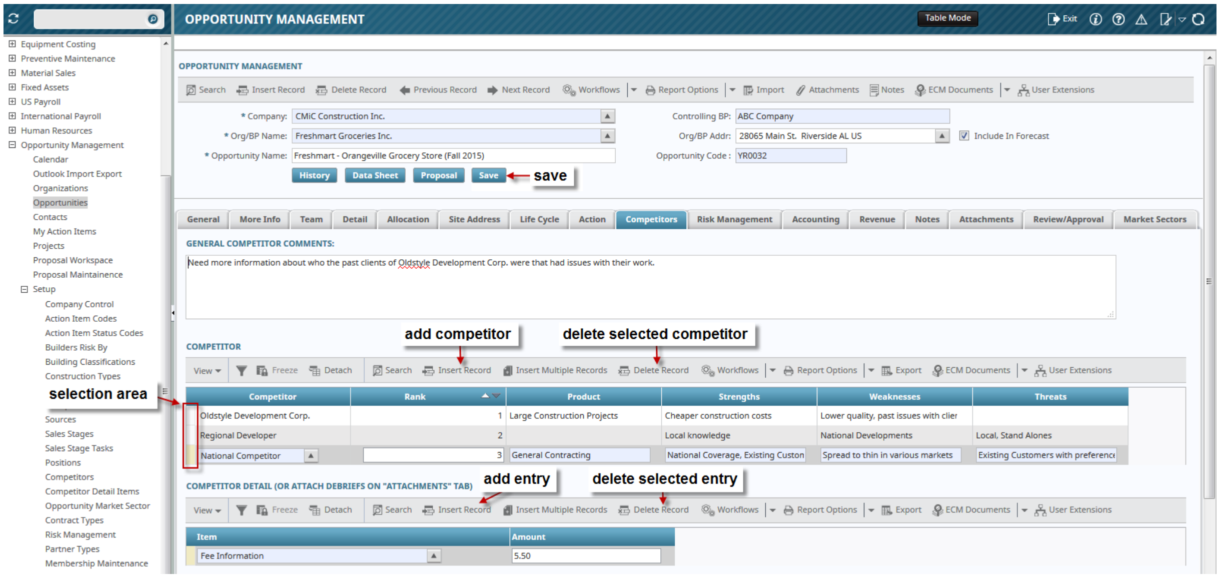
Edit or View Details of Action Item

To view or edit an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen that displays the details of the action item for viewing or editing. If any changes are made, click the Main Toolbar’s [**Save**] button to save the changes.

Delete Action Item

To delete an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen. In the My Action Item screen, click the [**Delete**] button.

Competitors – Tab



The **Competitor** tab is comprised of three sections: **General Competitor Comments**, **Competitor**, and **Competitor Detail**. This tab allows you keep track of your competition, in particular, their strengths, weaknesses and threats. This data can be useful in trying to beat the completion for the opportunity, and to track any information after the opportunity was awarded that might be useful for future sales efforts.

For the tables under the **Competitor** and **Competitor Detail** sections, to add an entry, click the [**Insert Record**] button on the corresponding Block Toolbar, as shown in the above screenshot. To delete an entry, select its correspond row and click the [**Delete Record**] button.

General Competitor Comments – Section

This section is used to enter comments about the competitors. Comments can be entered during the sales process, to help win the opportunity, or they can be entered after the opportunity was awarded, to help with future sales efforts.

After entering or editing a comment, click the [**Save**] button to save it.

Competitor – Section

This section contains a table that list the competitors that are competing with your company for the opportunity.

The following table describes the column headers of the Competitor table for this opportunity:

Competitor	Select competitor from list. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Competitors**
Rank	Competitor's ranking, during sales process or after opportunity was awarded.
Product	Competitor's product or service.
Strengths	Competitor's strengths.
Weaknesses	Competitor's weaknesses.
Threats	Any threats posed by the competitor.

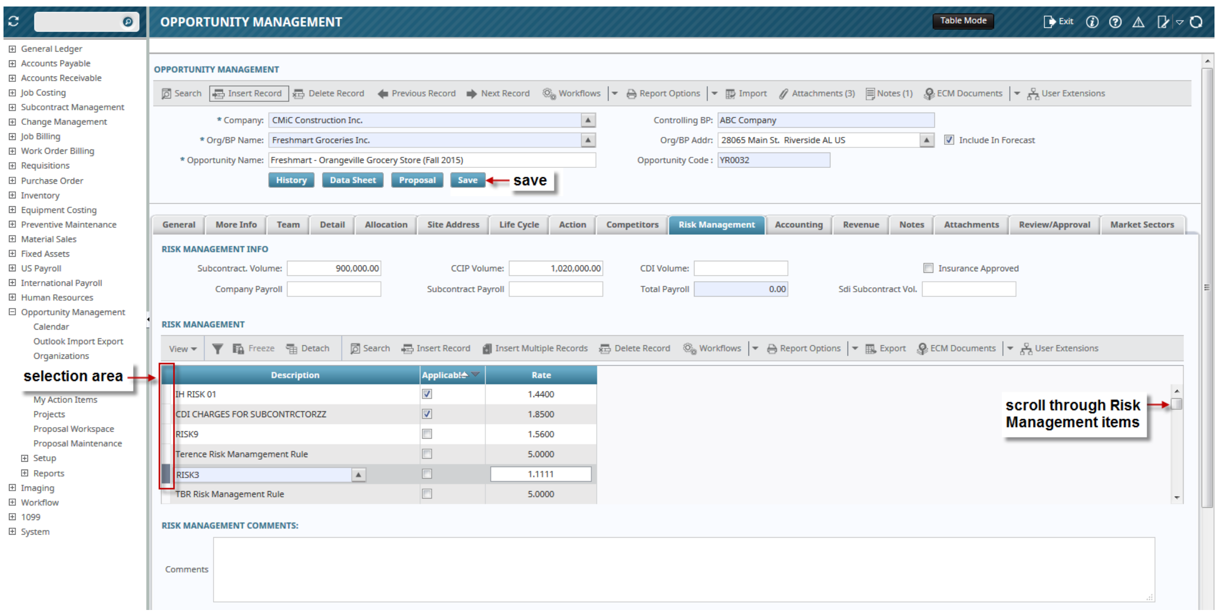
Competitor Detail – Section

This section contains a table that list details for the competitor selected in the **Competitor** section. When a competitor is selected from the above table, detail(s) about that competitor are shown in this lower table.

The following table describes the column headers of the Competitor Detail table:

Item	Select a competitor detail from the list. List of values for this field are maintained through the following maintenance screen: **Opportunity Management** > **Setup** > **Competitor Detail Items**.
Amount	Amount for detail.

Risk Management – Tab



This tab displays the risk management information that is required for job bidding and project management. It is comprised of three sections: **Risk Management Info**, **Risk Management**, and **Risk Management Comments**.

Risk Management Info – Section

This section displays risk management information associated with this opportunity's project, and the following table describes the fields for this section. Be sure to click the [**Save**] button to save any entered or edited information.

Subcontract Volume	Value represent the anticipated amount of the total contract that has been subcontracted. If there is a percentage associated to this field on the Company Control screen (**Opportunity Management** > **Setup** > **Company Control**), it will be populated automatically, using the following fields and calculation: **Potential Revenue** (on General tab) **x Subcontract Update %** (on Company Control screen). Edits to this field's value, as needed, are allowed.

CCIP Volume	Value identifies the potential CCIP Volume for the project. If there is a percentage associated to this field on the Company Control screen (**Opportunity Management** > **Setup** > **Company Control**), it will be populated automatically, using the following fields and calculation: **Potential Revenue** (on General tab) **x CCIP Update %** (on Company Control screen). Edits to this field's value, as needed, are allowed.
CDI Volume	Value identifies the Contractor Default Insurance volume.
Insurance Approved	Identifies that someone has approved the Subcontracted and CCIP Insurance values.
Company Payroll	Value identifies self-performed labor costs for the opportunity.
Subcontract Payroll	Total amount of subcontracted labor costs is entered here, if known and specified.
Total Payroll	Displays the total of the **Company Payroll** and **Subcontract Payroll** values.
SDI Subcontract Vol.	Estimated Subcontractors Default Insurance (SDI) volume.

Risk Management – Section

This section contains a table that lists risk management items, such as a particular insurance to cover the costs of a potential negative impact and its default rate. Items do not need to have default rates, and the rates are editable, as are the items.

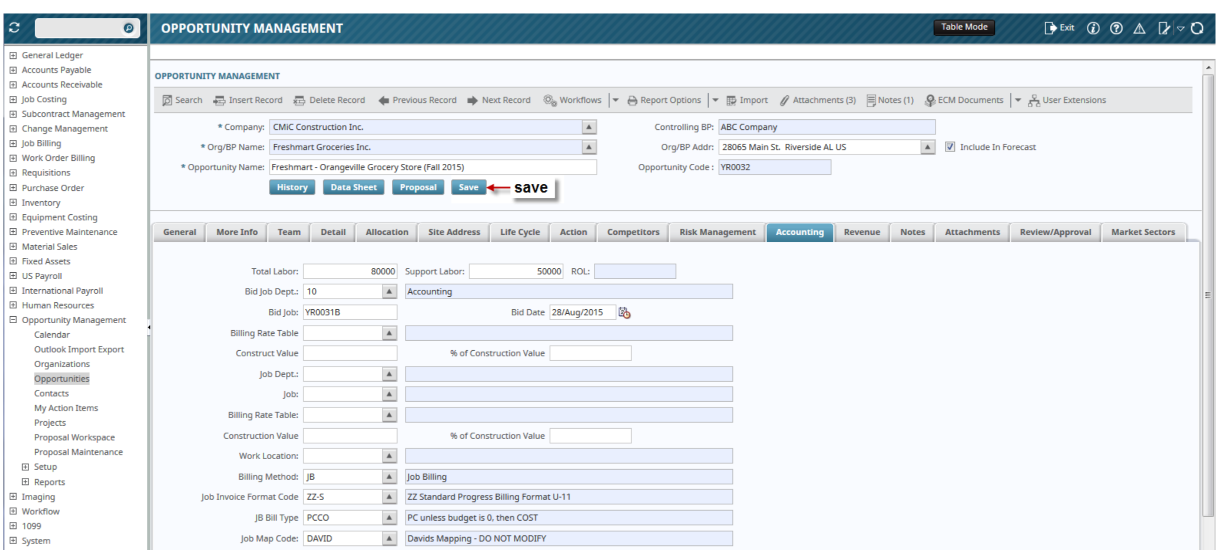
Using the table under the Risk Management section, if a risk management item applies to the opportunity's associated project, click its corresponding check-box, under the **Applicable** column. Click [**Save**] when finished.

The list of Risk Management Items is maintained through the following maintenance screen: **Opportunity Management > Setup > Risk Management**.

Risk Management Comments – Section

This section contains a text field to enter any comments that are relevant to the risk management plan. After entering or editing comments, click [**Save**].

Accounting – Tab



The **Accounting** tab displays data related to the opportunity's corresponding Bid Job or Job object. It can also be used to create a Bid Job object, associated to this Opportunity, if the flag **Automatically Create Bid Job** is not checked on the Company Control screen (**Opportunity Management** > **Setup** > **Company Control**). If needed, you can also link an existing Job object to this Opportunity object.

To summarize, a Bid Job object is relevant to the Job Costing module (used to build the bid/estimate amount, for instance), and a Job is relevant to the Job Billing module (used for billing the customer, for instance). Also, a Job is a Bid Job that has been won. Another distinction is that a Bid Job can be used to track the pre-contract costs incurred pursuing this opportunity, and when won, these costs can be transferred to the corresponding Job object, if desired.

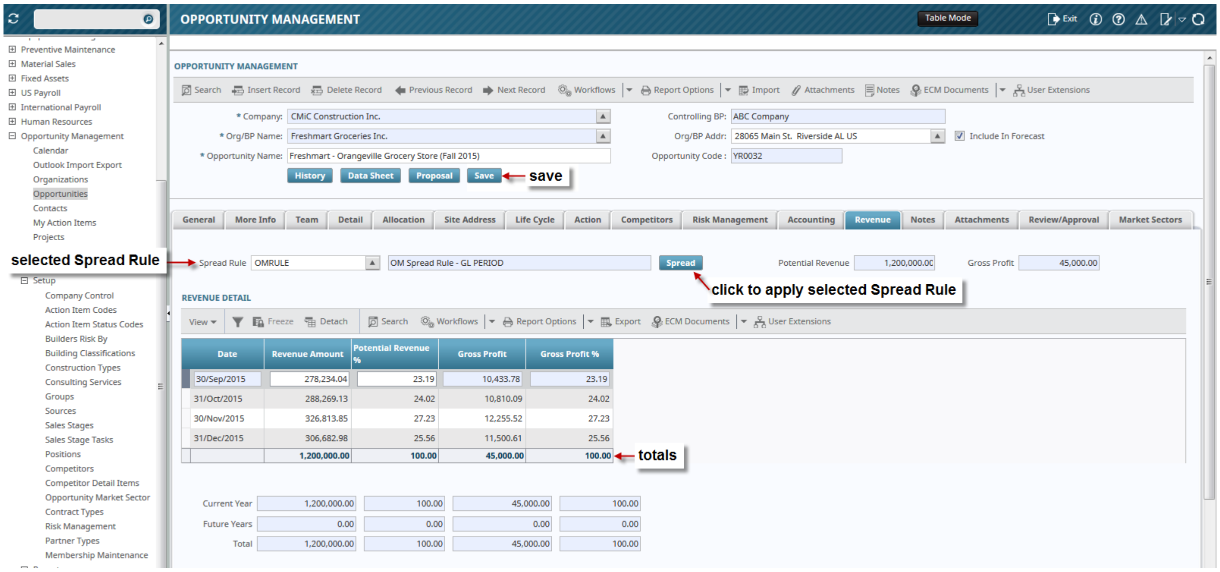
The information entered here for this opportunity's associated bid job or job will be copied over to the associated bid job or job record.

NOTE: The **Opportunities In Thousands** flag does not apply to data shared with the Job Costing and Job Billing modules. The value in amount fields must be entered with all preceding zeros. (Example, if Construction Value is $4,000,000.00, enter the value as 4000000).

The following table describes the fields on this tab. Be sure to click the [**Save**] button to save any entered or edited information.

Total Labor	Total labor amount.
Support Labor	Support labor amount.
ROL	Calculated field.
Bid Job Dept.	Company's department handling the bid job associated to this opportunity.
Bid Job	Bid job's code.
Bid Date	The Bid Date for the bid job.
Billing Rate Table	Select Job Billing Rate for the bid job from the list of values.
Construct Value	Construction value associated to the bid job.
% of Construction Value	Percentage of Construction value related to bid job.
Job Dept.	Select company's department handling the job associated to this opportunity.
Job	Select the Project Job from the list of values.
Billing Rate Table	Select Job Billing Rate for the job from the list of values.
Construction Value	Construction value associated to the job.
% of Construction Value	Percentage of Construction value related to job.
Work Location	Work location for department handling job/bid job.
Billing Method	Select the Billing Method for the job from the list of values.
Job Invoice Format Code	Select the Job Invoice Format for the job from the list of values.
JB Bill Type	Select the Job Billing Method Type for the job from the list of values.
Job Map Code	Select the Job Map Code for the job from the list of values.

Revenue – Tab



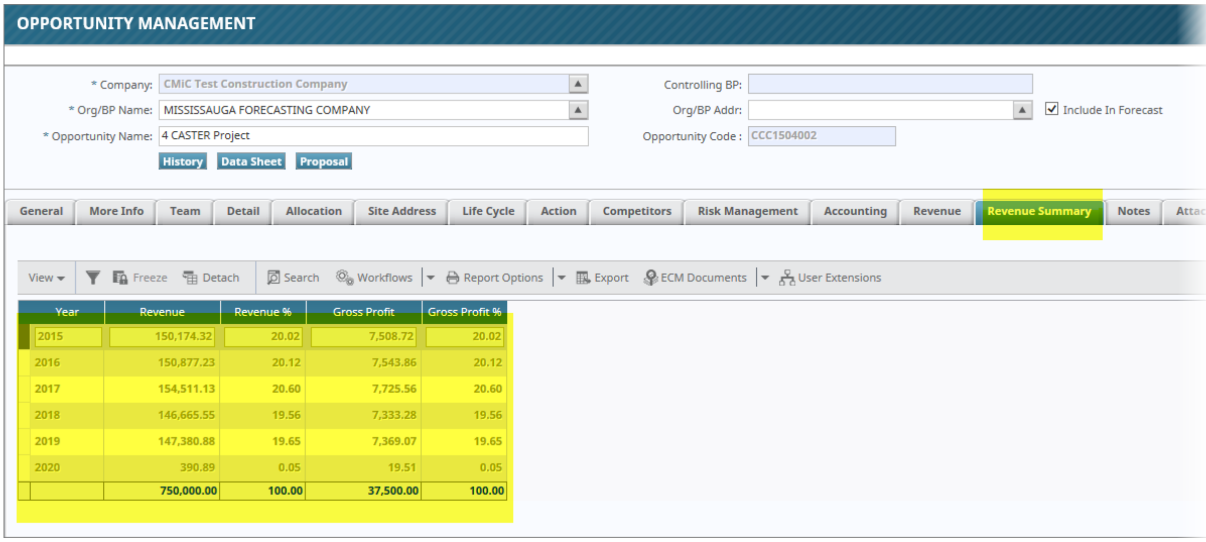
The **Revenue** tab displays the opportunity's potential sales revenue, spread out over an interval of time. This data is not generated by any Billing Revenue data associated to the job. These amounts and dates are based on the **Potential Revenue**, **Services Start**, and **Services End** fields on the **General** tab, and the rule selected from the **Spread Rule** drop-down list.

To use an alternative Spread Rule, as created through the Create Budget Spread Rule screen (**Job Costing** > **Setup** > **Local Tables** > **Create Budget Spread Rule**), select the new rule using the **Spread Rule** drop-down list. Then click the [**Spread**] button to apply the new rule.

Revenue Summary – Tab

This tab is hidden by default, but it can be added to the screen by using the Lite Editor. For details about the Lite Editor, please refer to the *V10xTOOLS ADF* **-** *Lite Editor.pdf* user guide.

The data from the **Revenue Detail** section on the **Revenue** tab will be grouped by years and displayed on this tab:



Notes – Tab & Toolbar

This tab displays notes entered for the organization. If there are any associated notes, the **Notes** option on the Block Toolbar will indicate how many.

NOTE: Notes entered for an opportunity are copied to the associated project.

For details about this tab, which is common to various screens of the Opportunity Management module, please refer to the *Notes Tab* sub-section of the *Common Icons & Functionality* section in this reference guide.

Attachments – Tab & Toolbar

The **Attachments** tab displays the attachments added to this opportunity record. If there are any added attachments, the **Attachments** option on the Block Toolbar will indicate how many.

NOTE: Attachments added to an opportunity are also added to the associated project.

For details about this tab, which is common to various screens of the Opportunity Management module, please refer to the *Notes Tab* sub-section of the *Common Icons & Functionality* section in this reference guide.

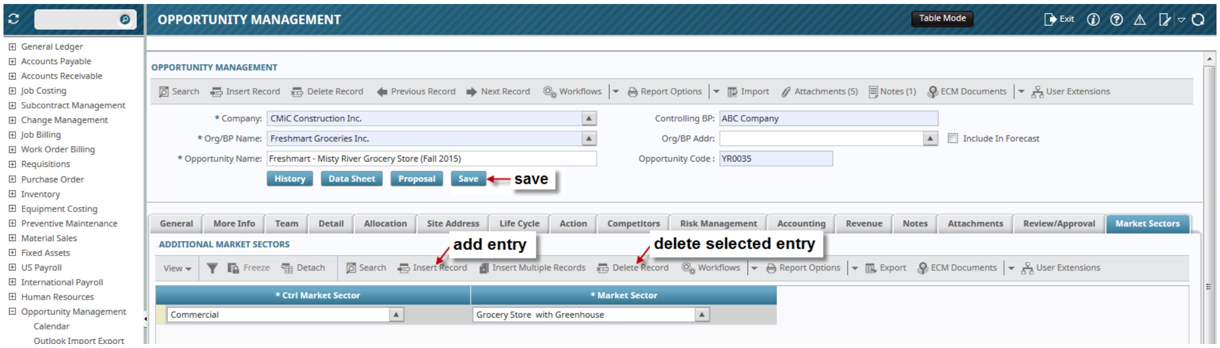
Review/Approval – Tab

This tab displays the review and approval audit history for the Opportunity from workflow.

The following describes the fields in this tab's table:

Action	Enter the review/approval action type.
Role	Role of person performing the review (audit).
Date	Date of opportunity's review (audit).
User	Reviewer
Notes	Notes relevant to review (audit).

Market Sectors – Tab



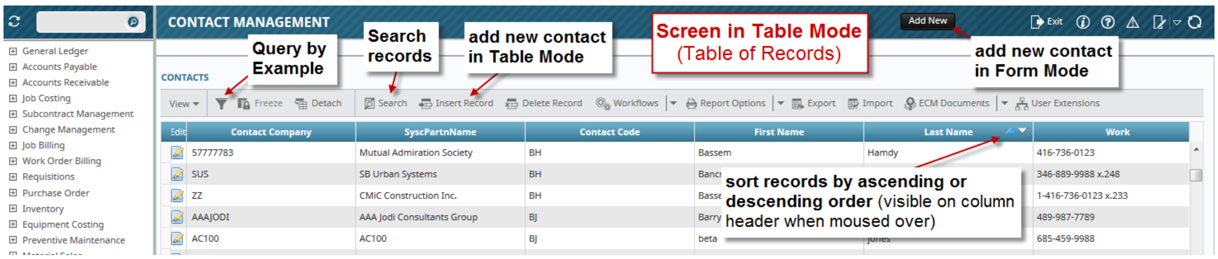
This tab is used to display and manage any additional market sectors that apply to this opportunity, in addition to the market sector selected on the **General** tab.

The following table describes the fields on this tab. Be sure to click [**Save**] to save any entered or edited entries.

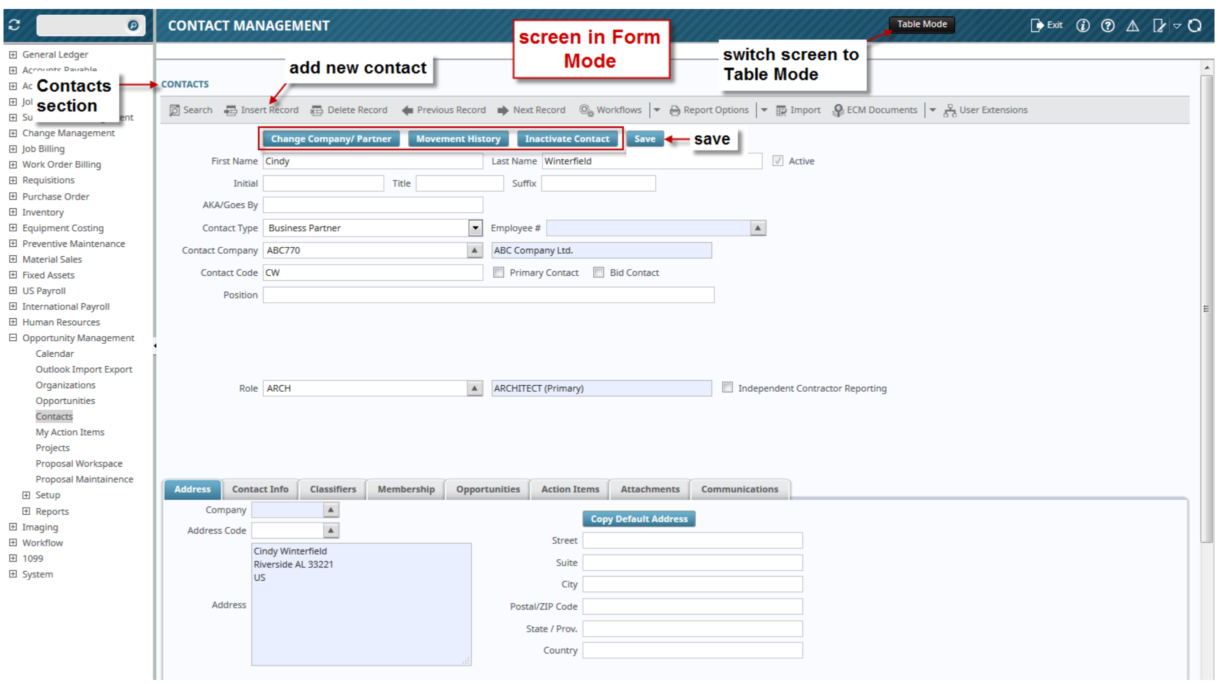
Ctrl Market Sector	Name of market sector's group. When the group is selected from this field, its market sector types will be available in the **Market Sector** field. The maintenance screen for market sector groups and their types is found through the following standard path: **Opportunity Management** > **Setup** > **Opportunity Market Sector**.
Market Sector	Particular market sector type, belonging to a particular market sector group. The group is chosen from the **Ctr. Market Sector** field. The values available in this drop-down are dependent on the value chosen for the **Ctrl. Market Sector** field.

Contacts

Overview – Contacts



Sample of Contacts screen in Table Mode



Sample of Contact screen in Form Mode

The Contact screen is used to create, view and manage Contact records, which can be associated to an Organization, Opportunity, Action Item or a Project record.

Add New Contact

Ensure Contact is Not Already in System

First, it is necessary to ensure that the contact about to be entered is not already in the system, so that you do not duplicate already existing data. This is necessary for avoiding issues that arise out of administrators working with different records, and to ensure that you do not miss any important information in any existing records. Refer to the sub-section *Search for Record* under the *Common Functionality* section for instructions on how to search for a record, to ensure that it does not already exist. Alternatively, and this could arguably be considered the best practice, use the systems De-duplication Searching Function.

De-duplication Searching Function

The OM module has a backend process that can be enabled to greatly reduce unintended duplications. The flag to enable this option is labeled **De-duplication Searching Function**, and it is found in the Company Control (OM Control File) screen. For details about this option, please refer to the *System Options* sub-section in this reference guide, under the *Set Up OM Module* section, then under the *Company Control* subsection. The relevant sub-sections under the *System Options* section are: *Enable De-duplication Searching Function* and *De-Duplication Searching Function – Parameter List*.

Add Contact

NOTE: If the **Enable De-duplication Searching Function** flag is checked, new entries of Organization, Opportunity, and Contact records can only be made when the screens to enter them are in Form Mode. This is necessary to prevent more than one record being saved at the same time, which cannot be handled by the De-duplication Searching function.

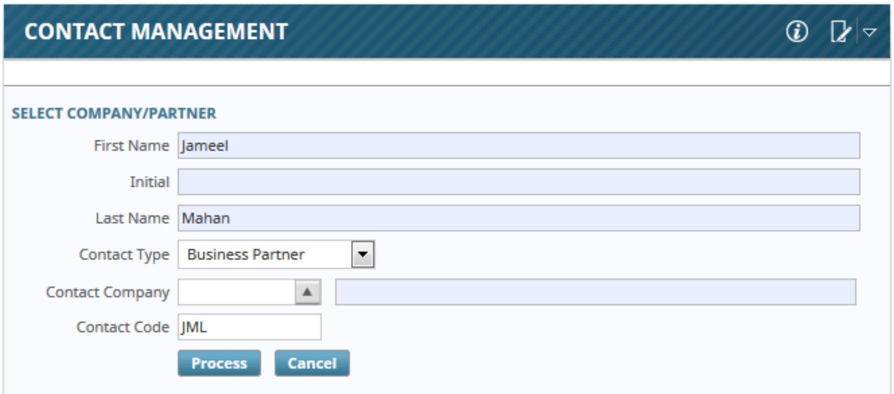
There are two options to create a contact through the Contact screen. One option is available when the screen is in Table Mode (listing all contacts), and the other option is when the screen is in Form Mode (displaying a single contact). The creation of contact records can also be initiated through the Organizations and Opportunities screens, and when these options are used, the new record's **Contact Type** and **Contact Company** fields are automatically populated.

To add a contact when the Contact screen in Table Mode, click the Main Toolbar's [**Add New**] button, as shown in the first screenshot of this section. This will switch the Contact screen to Form Mode, for the entry of the contact's information. If the Block Toolbar's [**Insert Record**] button is used, the entry of the contact's information is done while the screen is in Table Mode. Click [**Save**] when finished the contact's data entry.

To add a contact when the Contact screen is in Form Mode, click the Block Toolbar's [**Insert Record**] button. Click [**Save**] when finished.

For details about the fields under the **Contacts** section and on each tab, please refer to the relevant sub-sections of this section.

Change Contact's Company



To change the company with which the contact is affiliated, click the [**Change Company/Partner**] button (within red rectangle on second screenshot of this section).

NOTE: This operation cannot be done for inactive records.

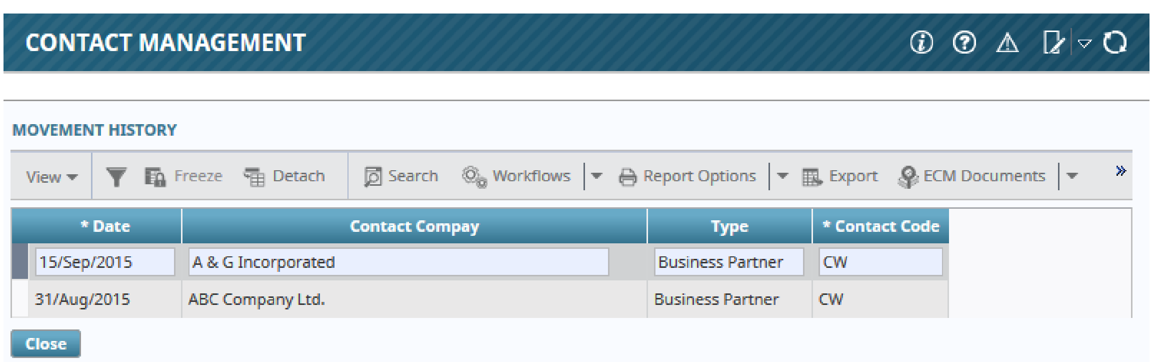
When a contact's **Contact Company** is changed and saved, the contact's previous record is saved as a separate record, but its status is set to inactive (**Active** flag, under **Contacts** section, is set to false). To view the history of changes to the contact's **Contact Company**, click the [**Movement History**] button.

The following table describes the non-name fields on this screen:

Contact Type	Contact type: Business Partner, Organization, or Company, determined by the organization type of the organization with which this contact is affiliated. The selection made in this field determines what values are available for the **Contact Company** drop-down list.
Contact Company	Business Partner, Organization, or Company with which this contact is affiliated. Value selected by **Contact Type** field determines what values are available in this list.
Contact Code	Code to identify contact.

To save any changes, click the [**Process**] button.

View Contact's Movement History



When a contact's **Contact Company** is changed and saved, the contact's previous record is saved as a separate record, and its status is set to inactive (**Active** flag, under **Contacts** section, is set to false). Also, the contact's previous Contact Company, Contact Type, and Contact Code, along with the date that the change was made, is saved as a Movement History record.

To view a contact's Movement History records, click the [**Movement History**] button (within red rectangle on second screenshot of this section).

Make Contact Inactive/Active

To make an active contact record inactive, click [**Inactivate Contact**] (within red rectangle on second screenshot of this section). The system will then ask you to confirm the inactivation. Click [**Yes**] and the contact will be inactivated, or click [**No**] to abort. This will set the record's **Active** flag, under the **Contacts** section, to false.

To make an inactive contact record active, click the [**Activate Contact**] button. Click [**Yes**] and the contact will be activated, or click [**No**] to abort. This will set the record's **Active** flag to true.

NOTE: Inactivated contact records stay in the database, but you will not be able to see them if you do not have the **SHWINACCNT** System Privilege to view inactive contacts.

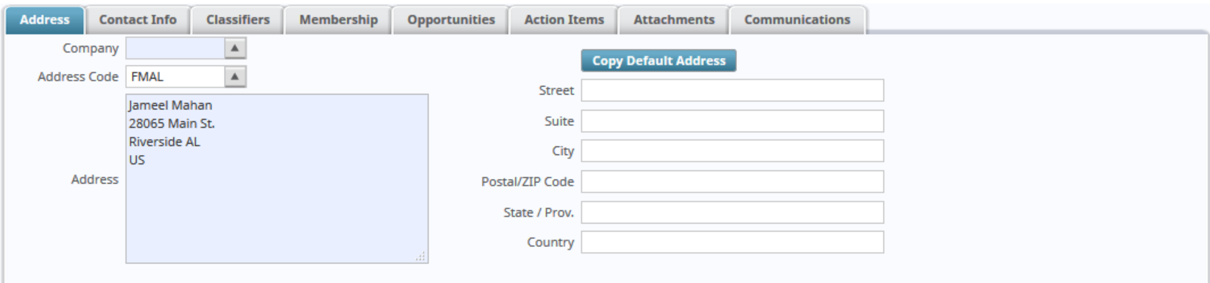
Contacts – Section

The **Contacts** section displays the contact's basic information. The following table describes this section's fields:

First Name	Contact's first name.
Last Name	Contact's last name.
Active	Indicates if contact record is active. **NOTE**: When a contact's **Contact Company** is changed, the contact's previous record is saved as a separate record and its status is set to inactive.
Initial	Contact's middle name initial.
Title	Title applicable to contact.
Suffix	Suffix applicable to contact's name.
AKA/Goes By	Alternative name by which contact is also known.
Contact Type	Contact Type: Business Partner, Organization, or Company, determined by the organization type of the organization with which this contact is affiliated. The selection made in this field determines what values are available for the **Contact Company** drop-down list.
Employee #	If contact's **Contact Type** is Company (their company is also your company or a company that is a member of your company's group), this field is enabled for you to enter an employee number, or to search for and select the contact's employee number.
Contact Company	Business Partner, Organization, or Company with which this contact is affiliated. The value selected by the **Contact Type** field determines what values are available in this list.
Contact Code	Code to identify this contact record.
Primary Contact	Indicates if contact is the primary contact for organization specified by **Contact Company** field.

Bid Contact	Indicates if contact is a Bid Contact for an opportunity's bid process.
Position	Position within organization specified by **Contact Company** field.
Role	Project Management Role contact performs. Maintenance screen: **Job Costing** > **Setup** > **Local Tables** > **Project Management Roles**.
Independent Contractor Reporting	Indicates if contact is an independent contractor, whose services need to be reported on 1099-MISC tax forms.

Address – Tab



This tab displays a contact's address, and the following table describes this section's non-standard fields:

Company	If contact's **Contact Type** is Company (their company is also your company or a company that is a member of your company's group), this field displays the contact's company. Also, this field determines what values are available for the **Address Code** field.
Address Code	Contact's address code, which populates the **Address** field. Lists all of Address records that have been created for the contact's affiliated organization.

When a new contact is created, the **Address** field (display only) gets automatically populated with the address of the contact's affiliated organization, as specified on the organization's **Detail** tab.

Manually Enter Address

Use the address fields under the [**Copy Default Address**] button to manually change the contact's address.

Overwrite Address to Organization's Default Address

Use the [**Copy Default Address**] button to overwrite the contact's address with the address of the contact's affiliated organization, as specified on the organization's **Detail** tab.

Use Organization's Address Records to Set Contact's Address

Use the **Address Code** drop-down list to select an address that has been entered for the contact's affiliated organization. To create a new Address record for the organization, which can then be selected from this field, use the affiliated organization's **Addresses** tab.

Contact Info – Tab

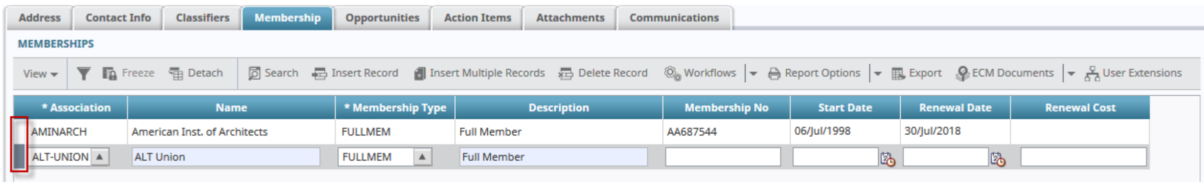
This tab displays a contact's standard contact information, except the **Send Email as HTML** flag. This flag indicates if emails sent to the contact need to be in the HTML format.

After any entries or edits are made, click the Main Toolbar's [**Save**] button.

Classifiers – Tab

If set up for your company, this tab displays the user defined classifiers.

Membership – Tab



This tab displays any professional associations or organizations to which the contact belongs.

The following table provides details about the fields on this tab:

Association	Professional association or organizations to which the contact belongs. Maintenance screen: **Opportunity Management** > **Setup** > **Membership Maintenance**.
Name	Name of association or organizations.
Membership Type	Select membership type from list of values. Maintenance screen: **Opportunity Management** > **Setup** > **Membership Maintenance** *NOTE: You must click **Membership Type Maintenance** option, as follows: 
Description	Description of **Membership Type**.
Membership No	Membership number.
Start Date	Date membership was issued.
Renewal Date	Date membership needs to be renewed.
Renewal Cost	Cost of renewing membership.

Add Entry

To add a new record, click the [**Insert Record**] button, enter the details, and click [**Save**].

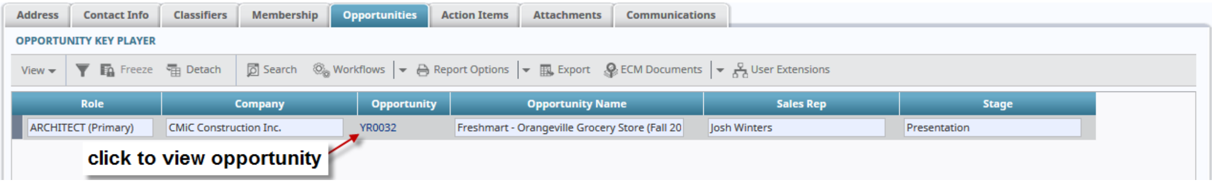
Delete Entry

To delete a record, select its row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Export Membership Records to File

To create an XLSX (spreadsheet) file of the contact's membership records, click the [**Export**] button. You can then use your web browser to specify where to save the file, or use it to open and print the file.

Opportunities – Tab



This tab lists the opportunities for which the contact is a key player (member of Opportunity Team).

The following table provides details about the fields on this tab:

Role	Role performed by contact as a key player (member of Opportunity Team).
Company	Company affiliated to contact.
Opportunity	Opportunities for which the contact is a key player.
Opportunity Name	Opportunity's name.
Sales Rep	Sales representative handling opportunity.
Stage	Current stage of opportunity.

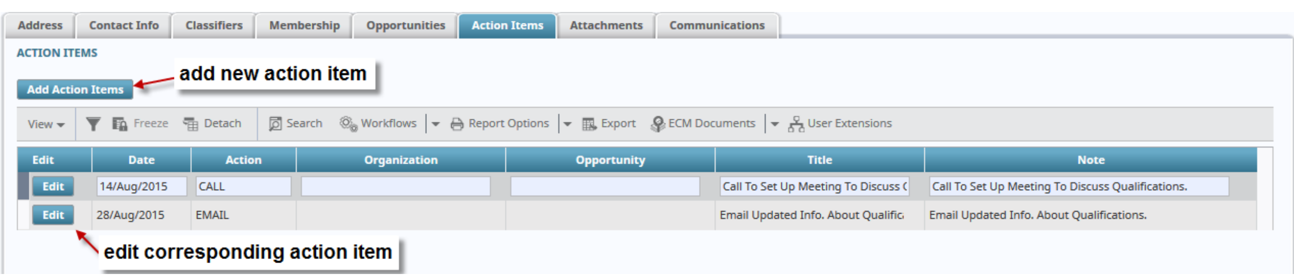
View Opportunity for which Contact is Key Player

To view opportunities for which the contact is a key player, click the corresponding code under the **Opportunity** column, as shown in the screenshot.

Export Listed Opportunities to File

To create an XLSX (spreadsheet) file that lists the opportunities for which the contact is a key player, click the [**Export**] button. You can then use your web browser to specify where to save the file, or use it to open and print the file.

Action Items – Tab



The **Action** tab displays the contact's scheduled action items. For details about the fields of action items, and about the My Action Items screen that is launched when performing the following operations, please refer to the *My Action Items* section of this reference guide.

Add Action Item

To add an action item, click the [**Add Action Items**] button, as shown in the above screenshot. This brings up the standard My Action Item screen used throughout the Opportunity Manger module.

When an action item is added, it will be added to the calendar displayed by the Calendar screen.

Edit or View Details of Action Item

To view or edit an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen that displays the details of the action item for viewing or editing. If any changes are made, click the Main Toolbar's [**Save**] button to save the changes.

Delete Action Item

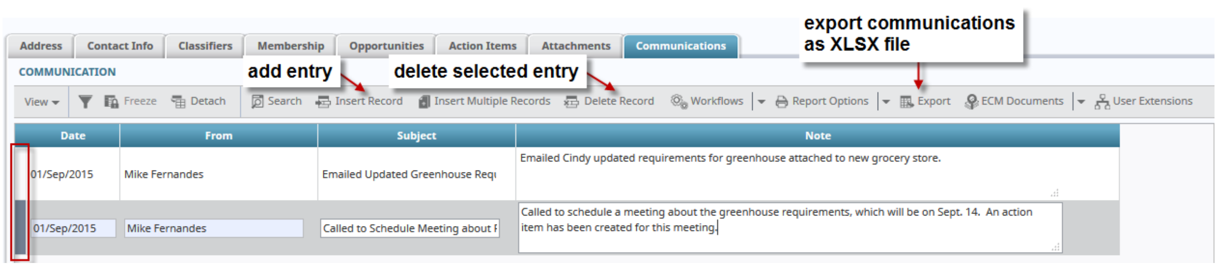
To delete an action item, click the corresponding [**Edit**] button, under the **Edit** column, as shown in the above screenshot. This brings up the My Action Item screen. In the My Action Item screen, click the [**Delete**] button.

Attachments – Tab

This tab displays attachments added to this contact record. If there are any added attachments, the Block Toolbar's **Attachments** option will indicate how many.

For details about this tab, which is common to various screens of the Opportunity Management module, please refer to the *Attachments Tab* sub-section of the *Common Icons & Functionality* section in this reference guide.

Communications – Tab



The Communications tab is used to record communications with a contact.

The following table describes the fields on this tab:

Date	Date communication record was created. Display only field, automatically populated when record is created.
From	Name of Enterprise user who created this record.
Subject	Subject matter of communication with contact.
Note	Note about content of communication with contact, and any relevant details.

Add Communication

To add a new record, click the [**Insert Record**] button, fill in the communication details, and click [**Save**].

Delete Communication

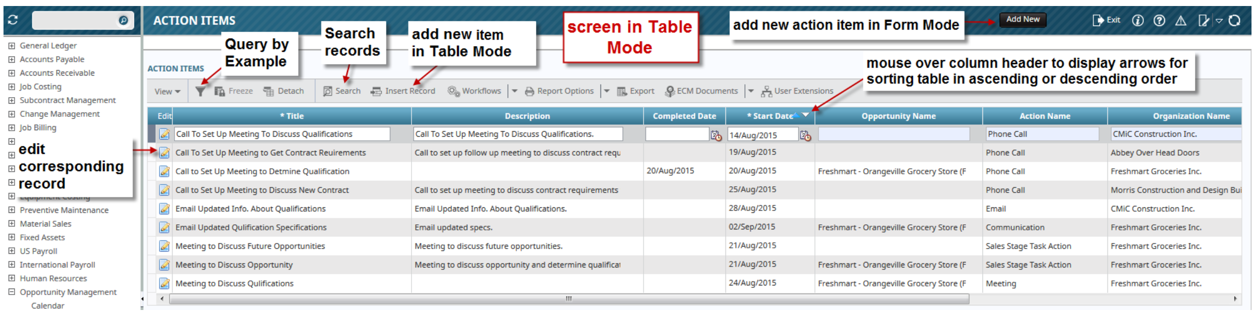
To delete a record, select its row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Export Communications to File

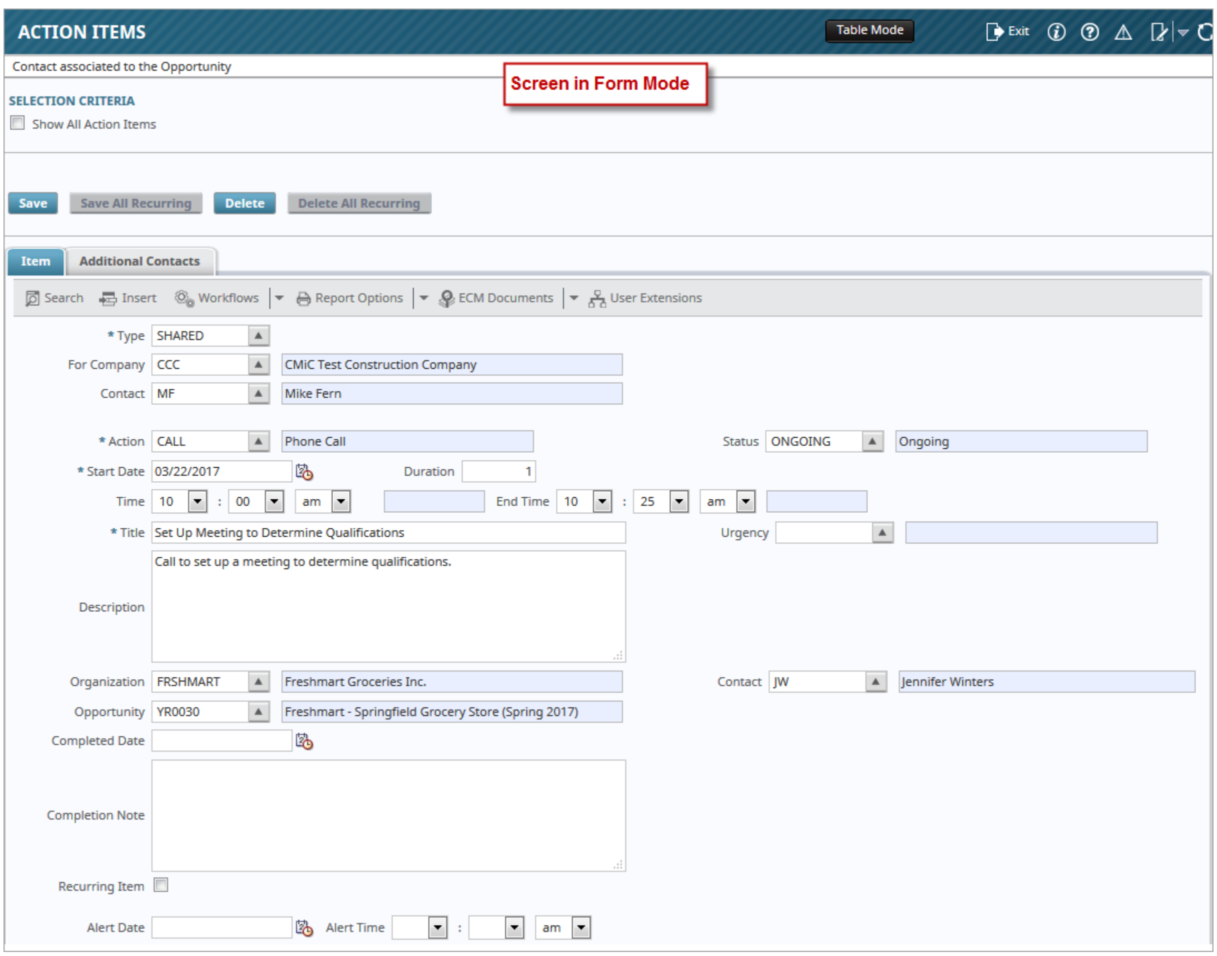
To create an XLSX (spreadsheet) file of the communication records, click the [**Export**] button. You can then use your web browser to specify where to save the file, or use it to open and print the file.

My Action Items

Overview – My Action Items

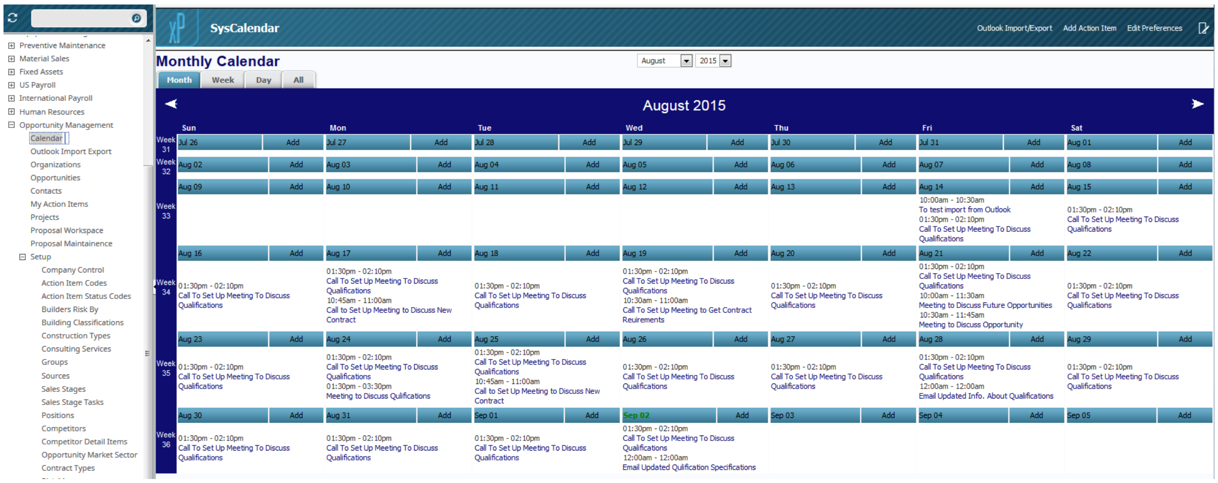


My Action Items screen in Table Mode (displaying list of records)



My Action Items screen in Form Mode (displaying single record)

Action Items are a management tool that enables users to schedule and coordinate actions, like phone calls, delivery dates, and meetings, against Organizations, Opportunities or Contacts. Actions are recorded as an action item, which are classified by a type, such as: Introduction Phone Call, Marketing Mailing Follow-up, Meeting Setup, or Quote Due. When an action item is saved, it is added to the calendar displayed by the Calendar screen, as shown in the below screenshot. Also, an action item need not only be for yourself, you can create an action item for another member of your sales or opportunity team. For example, you could create an action item of type "**Bid Due Date**" to make the estimator aware of the date and time the bid is due.

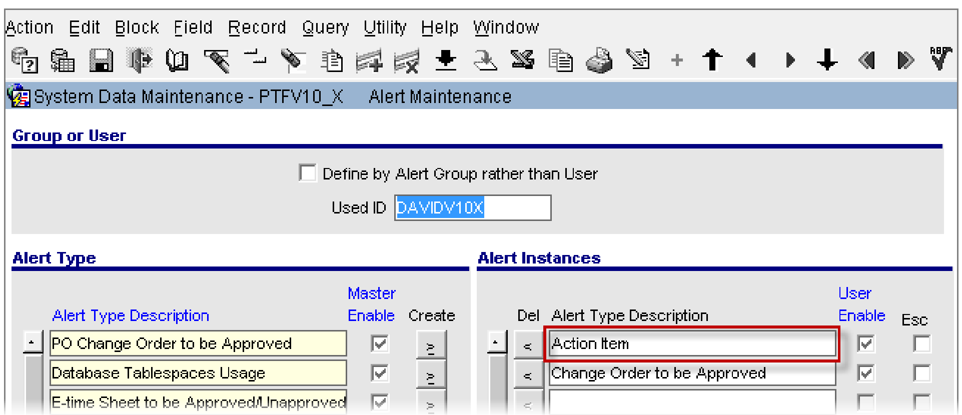


Sample of Calendar screen

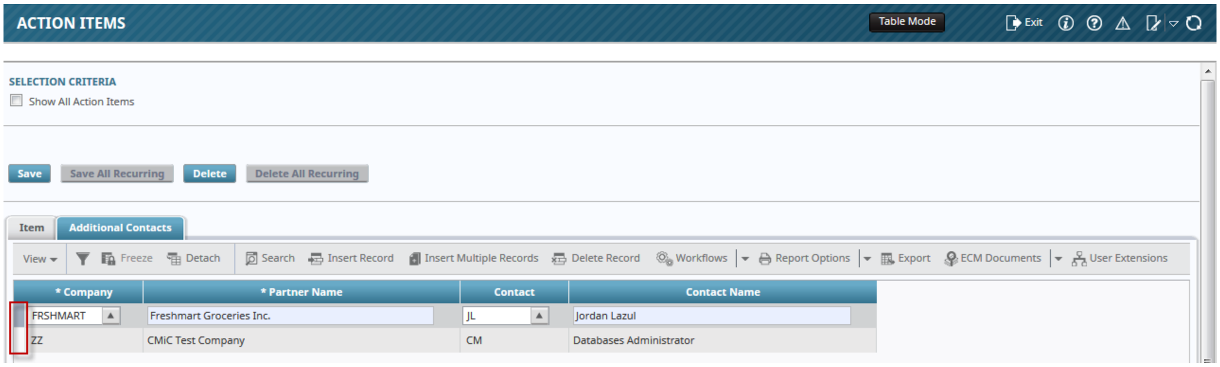
Item – Tab

The following table describes the fields on the **Item** tab:

Type	Indicates if visibility of action item is shared, private, or public. Private action items are items that only you can see, Public items are items anyone using the OM module can see, while shared items are restricted to certain persons only.
For Company	Select the company/organization of the contact, selected by the adjacent **Contact** field, who crated this action item. This field's valued determines what values are available for the adjacent **Contact** field. Automatically set to user's company, but is editable.
Contact	Contact responsible for competing action item, and is affiliated with the company selected by the **For Company** field. The **For Company** value determines what values are available for this field. Automatically set to user's contact code, but is editable. **NOTE**: Additional contacts can be added using the **Additional Contacts** tab.
Action	Action Type (call, email, meeting…). Maintenance screen: **Opportunity Management > Setup > Action Item Codes**.
Status	Current action item's status. Maintenance screen: **Opportunity Management > Setup > Action Item Status Codes**.
Start Date	Action's start date.
Duration	Duration of action, in terms of days.
Time	Action's start time, or time it must be completed.
End Time	Action's end time.

Title	Action item's title.
Urgency	Action's urgency.
Description	Description of action to perform.
Organization	1. Opportunity Related: Organization offering opportunity, for which action is to be taken. Chosen value determines what values are available for the **Opportunity** field. 2. Other: Organization for which action is to be taken. Ex. Vendor for which a call must be made.
Contact	Contact affiliated with the organization chosen by the **Organization** field. Value chosen by Organization field determines what values are available here.
Opportunity	Opportunity offered by organization chosen by the **Organization** field. Value chosen by Organization field determines what values are available here.
Completed Date	Date action was completed.
Completion Note	Note about the completion of the action.
Recurring Item	Indicates if action is a recurring action. If this flag is checked, a Recurrence Section is visible. When creating an action item, this option is used to add multiple instances of the action item to the calendar. If this flag is set and an interval is selected, when the action item is saved, multiple instances of the action item will be added to the calendar (based on interval).
Alert Date, **Alert Time**	Specify the date and time for an alert about the Action Item to be sent out to all Contacts listed on the **Item** and **Additional Contacts** tabs that have been set up to receive alerts for action items via the Define Simple Alerts screen (shown below; currently only Forms version of screen is available) in the Forms version of the System Data module.  For details about the Define Simple Alerts screen, please refer to the *Defining Simple Alerts* subsection in the Forms version of the System Data user guide (SDv10x.pdf).

Additional Contacts – Tab



This tab is used to add additional contacts to the action item. The following table describes the column headers for the table on this tab:

Company	Select the company/organization of the contact that will be selected by the **Contact** field. This field's valued determines what values are available for the **Contact** field.
Partner Name	Display only field; displays name of organization chosen by the **Company** field.
Contact	Contact Code of contact who belongs to organization chosen by the **Company** field. The value chosen by **Company** field determines what values are available for this field.
Contact Name	Display only field; displays contact's name for code chosen by **Contact** field.

Add Entry

To add a new contact to the action item, click the Block Toolbar's [**Insert Record**] button, enter the details, and click [**Save**].

Delete Entry

To delete a contact, select its row using the selection area, framed by the red rectangle, and click the Block Toolbar's [**Delete Record**] button.

Add Action Item

There are two options to add an action item through the My Action Items screen, one option is available when the screen is in Table Mode (listing all action items), and the other when the screen is in Form Mode (displaying a single action item). The My Action Items screen can also be launched through the Organizations and Opportunities screens.

For details about the fields on the tabs of the screen in Form Mode, please refer to the *Item – Tab* and *Additional Contacts – Tab* sub-section.

To add an action item when the My Action Item screen in Table Mode, click the Main Toolbar's [**Add New**] button, as shown in the first screenshot of this section. This will switch the screen to Form Mode, for the entry of the action item's information. If the Block Toolbar's [**Insert Record**] button is used, the entry of the action item's information is done while the screen is in Table Mode. Click [**Save**] when finished.

To add an action item when the My Action Item screen is in Form Mode, click the Block Toolbar's [**Insert Record**] button. Click [**Save**] when finished.

When an action item is saved, it will be added to the calendar displayed by the Calendar screen, as shown in the previous screenshot.

Recurring Action Item

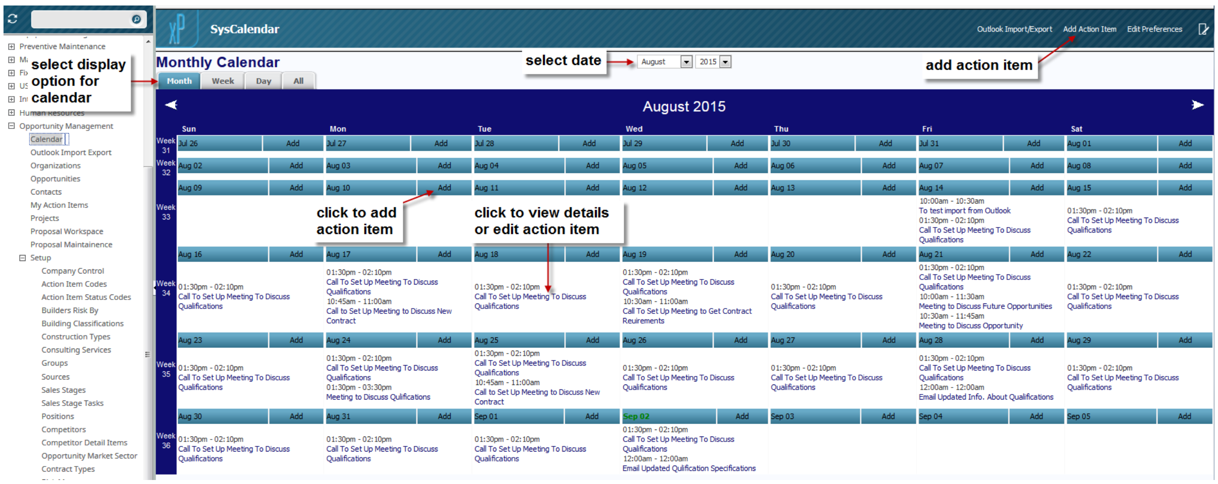
To make the action item a recurring action, in other words, to add multiple instances of the action item, check the **Recurrence** check-box. This causes the Recurrence section to be displayed, which is used to select a regular interval for when the action item is to recur. In this section, select the interval and select when the recurrence is to stop. When finished, click [**Save**], and multiple instances of the action item will be added to the calendar, based on the selected interval.

Delete Action Item

To delete an action item when the screen is in Form Mode (operation not available in Table Mode), simply click the [**Delete**] button. Caution, as no prompt is given to confirm the deletion.

Calendar

Overview – Calendar



Sample of Calendar screen.

The Calendar screen is used to display the scheduled action items, added through the My Action Items screen, to help coordinate and track the efforts performed through the Opportunity Management module.

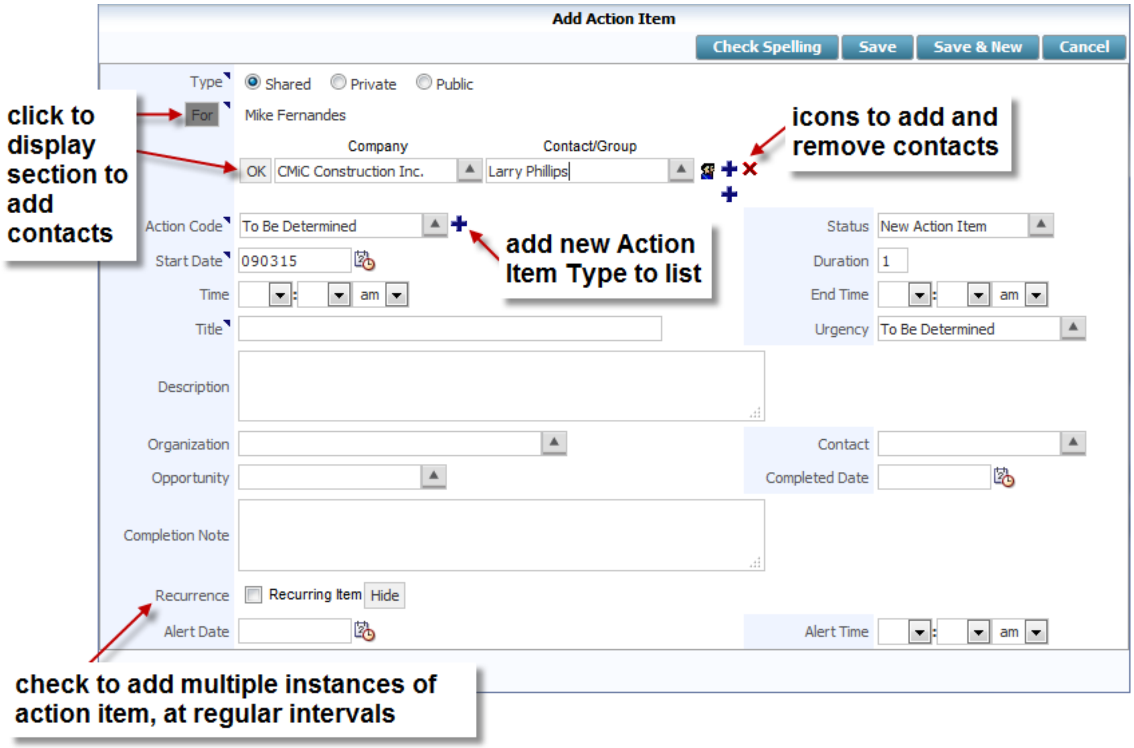
Change Calendar's Display (Month, Week, Day, List)

Use the **Month**, **Week**, **Day**, or **All** tabs to change the calendar's display, as shown in the above screenshot.

The **All** tab lists the action items for the date range specified by the **From** and **To** fields. To have the calendar display action items for a different date rage, specify the desired range and click [**Go**]

Action Item Screen – JSP

Overview - Action Item Screen



The Action Item screen used for the Calendar screen (application) is a JSP version of the My Action Items screen.

As mentioned in the *My Action Items* section of this reference guide, action items are a management tool that enables users to schedule and coordinate actions like phone calls, delivery dates, meetings… against Organizations, Opportunities or Contacts. Actions are recorded as an action item, which is classified by a type, such as: Introduction Phone Call, Marketing Mailing Follow-up, Meeting Setup, or Quote Due. When an action item is saved, it is added to the calendar displayed by the Calendar screen, as shown in this section's first screenshot. Also, an action item need not be for yourself, you can create an action item for another member of your sales or opportunity team. For example, you could create an action item of type "**Bid Due Date**", to make the estimator aware of the date and time the bid is due.

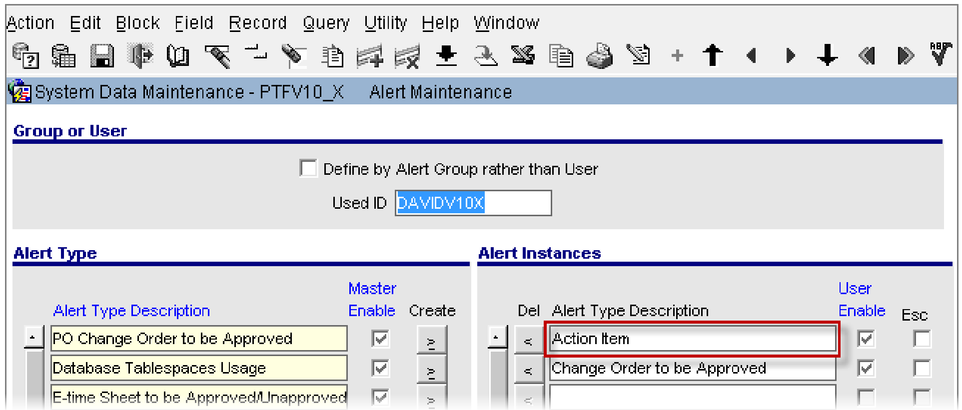
Data Fields

NOTE: Fields with a 'Blue Triangle' after their name are required (ex. Type).

The following table describes the fields on the Action Item screen:

Type	Indicates if visibility of action item is shared, private, or public. Private action items are items that only you can see, Public items are items anyone using the OM module can see, while shared items are restricted to certain persons only.

Company	Select the company/organization of the contact, selected by the adjacent **Contact** field, who crated this action item. This field's valued determines what values are available for the adjacent **Contact/Group** field.
Contact/Group	Contact or group responsible for competing action item, and is affiliated with the company selected by the **Company** field. The **Company** value determines what values are available for this field. Automatically set to user's contact code. **NOTE**: Additional contacts can be added by clicking ✚ (icon), as shown in the previous screenshot.
Action Code	Action Type (call, email, meeting…). Click ✚ (icon), next to drop-down list, to add a new Action Type, as shown in above screenshot. Maintenance screen: **Opportunity Management > Setup > Action Item Codes**.
Status	Current action item's status. Maintenance screen: **Opportunity Management > Setup > Action Item Status Codes**.
Start Date	Action's start date.
Duration	Duration of action, in terms of days.
Time	Action's start time, or time it must be completed.
End Time	Action's end time.
Title	Action Item's title.
Urgency	Action's urgency.
Description	Description of action to perform.
Organization	1. Opportunity Related: Organization offering opportunity, for which action is to be taken. Chosen value determines what values are available for the **Opportunity** field. 2. Other: Organization for which action is to be taken. Ex. Vendor for which a call must be made.
Contact	Contact affiliated with the organization chosen by the **Organization** field. Value chosen by Organization field determines what values are available here.
Opportunity	Opportunity offered by organization chosen by the **Organization** field. Value chosen by Organization field determines what values are available here.
Completed Date	Date action was completed.
Completion Note	Note about the completion of the action.
Recurrence	Indicates if action is a recurring action. If this flag is checked, a Recurrence Section is visible. When creating an action item, this option is used to add multiple instances of the action item to the calendar. If this flag is set and an interval is selected, when the action item is saved, multiple instances of the action item will be added to the calendar (based on interval).

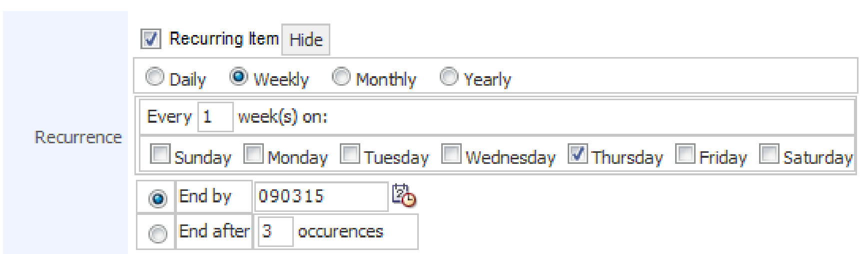
Alert Date, **Alert Time**	Specify the date and time for an alert about the Action Item to be sent out to all Contacts listed on the **Item** and **Additional Contacts** tabs that have been set up to receive alerts for action items via the Define Simple Alerts screen (shown below; currently only Forms version of screen is available) in the Forms version of the System Data module.  For details about the Define Simple Alerts screen, please refer to the *Defining Simple Alerts* subsection in the Forms version of the System Data user guide (SDv10x.pdf).

Add Action Item

To add an action item, from the Calendar screen, click the "**Add**" text next to a date in the calendar, or click the Main Toolbar's [**Add Action Item**] button, as shown in this section's first screenshot. This brings up the calendar's Action Items screen.

In the Action Items screen, enter the details, and refer to the previous section, *Data Fields*, if you need descriptions for the data fields. Click [**Save**] when finished, or, if you are adding more than one action item, click [**Save & New**] to save the action item and refresh the screen so that you can add another action item.

Add Recurring Action Item



To make the action item a recurring action, in other words, to add multiple instances of the action item, check the **Recurrence** check-box, as shown in this sections first screenshot. The Recurrence section will be displayed, as shown in the above screenshot. In this section, select the interval and select when it is to finish. When finished, click [**Save**], and multiple instances of the action item will be added to the calendar, based on the selected interval.

Edit or View Details of Action Item

From the Calendar screen, click the action item's title, in blue text, as shown in this section's first screenshot. This launches the Action Item screen.

If any edits are made, click the [**Save**] button.

Edit Recurring Action Item

If editing a recurring action item, make the edits and click the [**Save All Recurring**] button to save the changes to all instances of the recurring action item, or click [**Save**] to save the changes to just the displayed action item.

Reschedule Action Item

From the Calendar screen, click the action item's title, in blue text, as shown in this section's first screenshot. This launches the Action Item screen.

In the Action Item screen, click the [**Reschedule**] button. This will clear all the date and time fields, allowing the user to enter new date/time information as required. When the new information has been entered, click on the [**Save**] button to commit the changed schedule for the item.

Delete an Existing Action Item

From the Calendar screen, click the action item's title, in blue text, as shown in this section's first screenshot. This launches the Action Item screen.

To delete the action item, click the [**Delete**] button and confirm the deletion.

Delete Recurring Action Item

If deleting a recurring action item, click the [**Delete**] button to delete just the displayed action item, or click the [**Delete All Recurring**] button to delete all instances of the recurring action item. In the prompt screen, click [**OK**] to confirm the deletion.

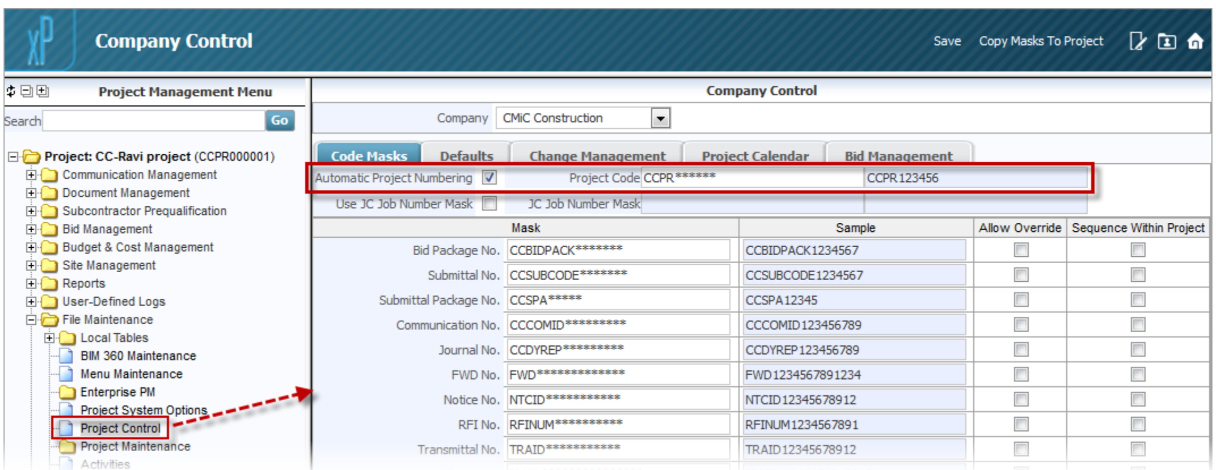
Projects

Overview – Projects

The Project Management module is used to track all activity related to projects, such as: tracking and controlling of costs, management of Subcontract processes, providing efficient billing methods, and staying on top of changes that may take place through any phase of the project.

As mentioned in the *Opportunities* section of this reference guide, when an Opportunity record is created, a corresponding Project record is created, which can be viewed through the Projects screen. Also, as mentioned, many of the fields of a Project record are shared with an Opportunity record, and changes to shared fields in an Opportunity record will also change the corresponding fields in the Project record. Changes to shared fields in the Project record, however, will not cause changes to the corresponding fields in the Opportunity record.

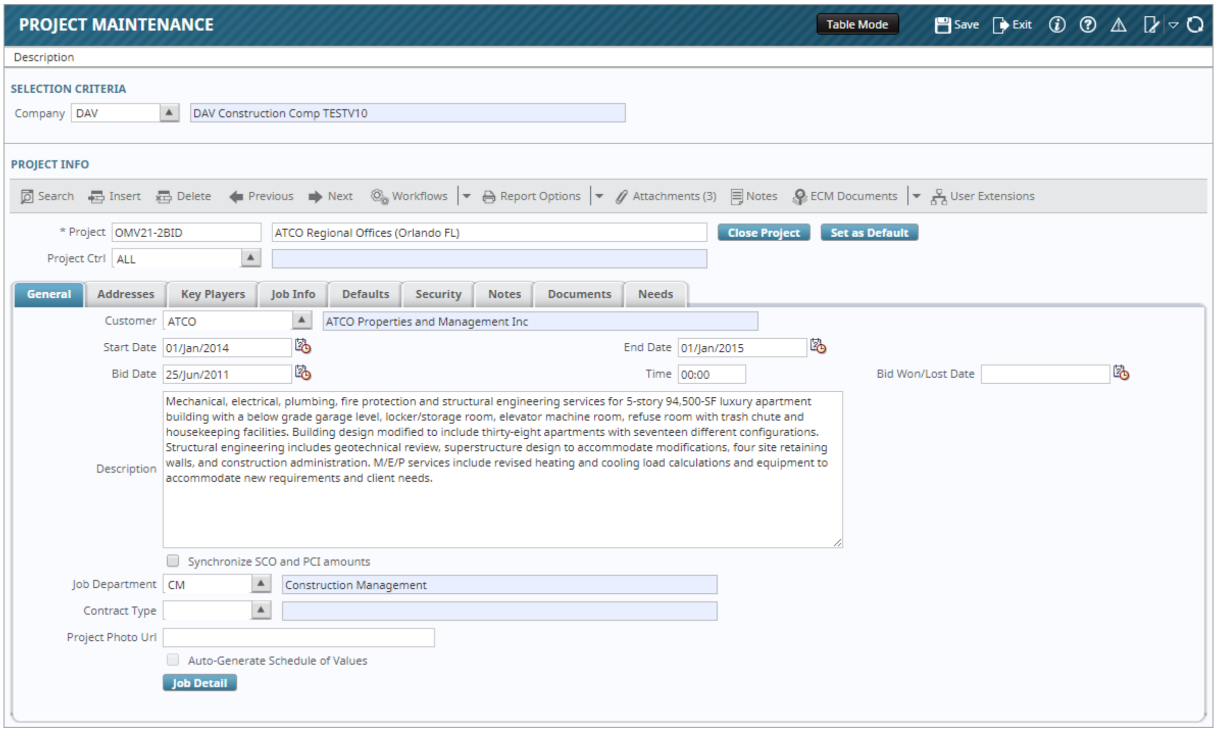
Project Control – xProjects Screen



The Project Control screen in the xProjects module contains options for the creation of new Project records, such as the **Automatic Project Numbering** option shown above.

If the **Automatic Project Numbering** box is checked, when entering new Projects the Project Code field will be display-only as the Project Code is automatically generated using the Project Code Mask (**Project Code** field framed above). The display-only field to the right of the **Project Code** shows a sample generated Project Code using the Project Code Mask.

Project – Screen

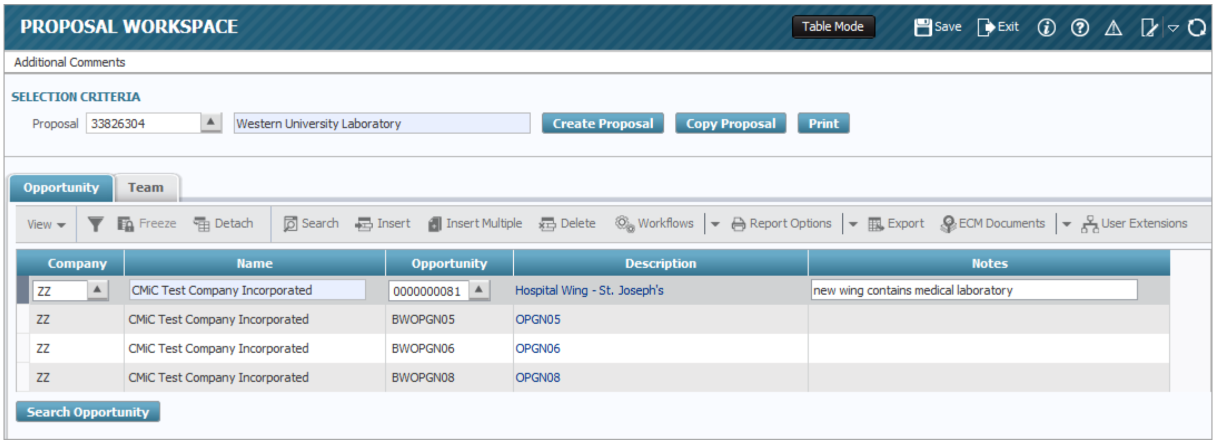


Pgm: PMPROJFM – Enter Project screen

For details about the Projects screen, please refer to the Project Management reference guide.

Proposal Workspace

Overview – Proposal Workspace



Program: OMPROPOSALWKSP; sample of Proposal Workspace screen

Proposal Workspace is a tool designed to enhance the process of generating well-informed project proposals, by providing functionality to compile a list of relevant historical Opportunities and a list of Key Players with relevant experience and skills to reference.

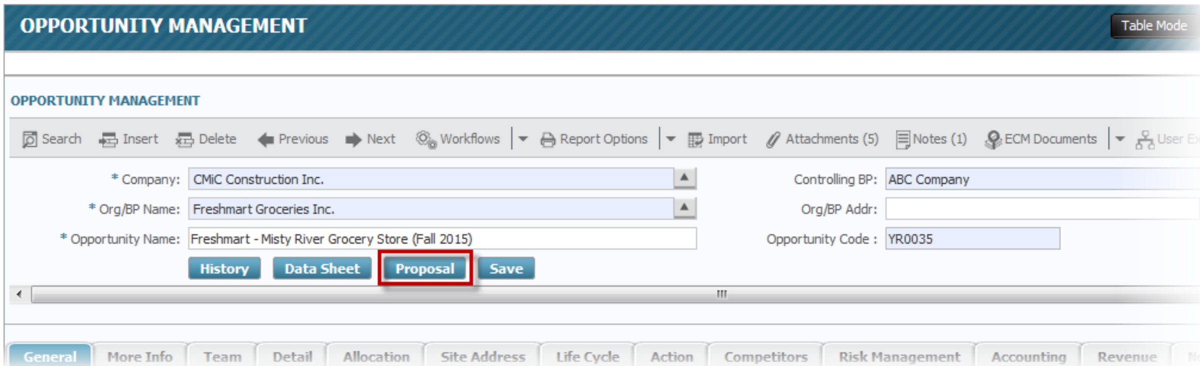
Proposal Workspace can also be used to fill in some of the details of a new Opportunity more accurately and comprehensively, right from the start; which would get copied to the Opportunity's associated Project, Bid Job and Job records, if relevant. In particular, Proposal Workspace can enhance the process of compiling an effective team of Key Players for the Opportunity, with the relevant experience and skills to most effectively manage it. A suitably experienced management team is much better suited to identify hidden costs, risks, and potential issues that can arise out of factors that are unique to an opportunity of a particular market sector, which, of course, are quite important for such tasks as bid, budgeting, and risk management.

In regards to how Proposal Workspace is used, it is utilized by creating a Proposal Workspace record that is associated to the new Opportunity record needing detailing and a proposal (optionally, however, a Proposal Workspace can be created that is not associated to an Opportunity; see subsection *Create Proposal Not Associated to Opportunity – [Create Proposal] Button* for details). Then, a list of similar Opportunities is compiled under the **Opportunity** tab, along with a list of Key Players with relevant expertise, under the **Team** tab. The listed Opportunities and Key Players can then be referenced to generate a proposal, detail the new Opportunity, and to compile its team of Key Players.

Proposal Workspace – Screen

There are two ways to launch the Proposal Workspace screen, and when creating a Proposal Workspace, the option used to launch the screen is relevant.

To create a Proposal Workspace that is associated to an Opportunity, click the [**Proposal**] button on the Opportunity screen, shown in the screenshot below.

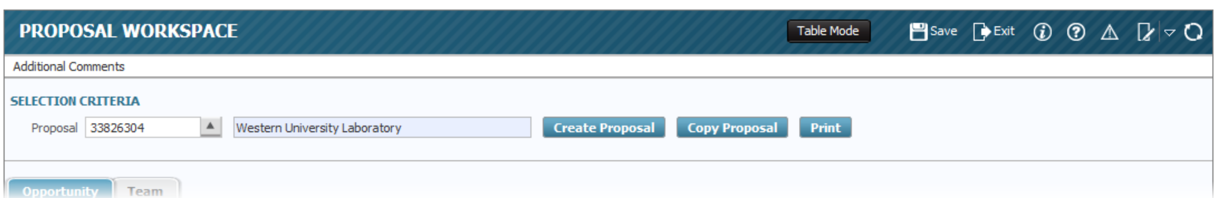


This launches the Proposal Workspace screen, with a Proposal Workspace record automatically created for and associated to the Opportunity displayed by the Opportunity screen. Afterwards, the [**Proposal**] button can be used to view the Opportunity's Proposal Workspace (note, at most, an Opportunity can have one Proposal Workspace associated to it).

To create a Proposal Workspace that is not associated to an Opportunity, launch the Proposal Workspace screen via the Treeview menu, then click the [**Create Proposal**] button. See the following *[**Create Proposal**] – Button* subsection for details.

To delete a Proposal Workspace, or to change its name, please refer to the *Proposal Workspace Maintenance* section.

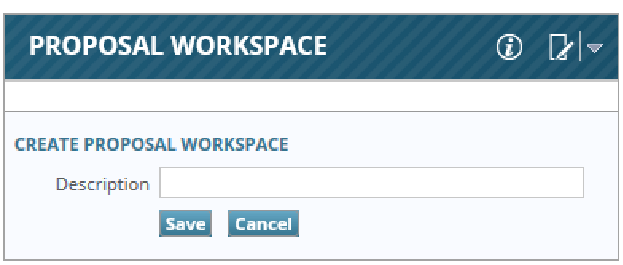
Selection Criteria – Section



This section (screen header) is used to select a Proposal Workspace, create a new Proposal Workspace, copy an existing Proposal Workspace, or to print the contents of a Proposal Workspace.

The **Proposal** field is used to select the Proposal Workspace to display.

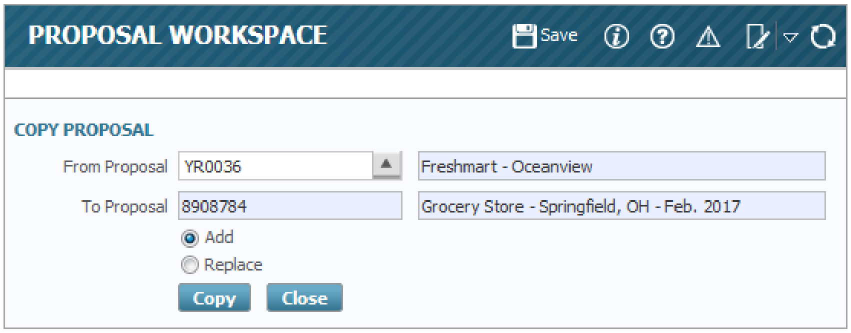
[**Create Proposal**] – Create Proposal Not Associated to Opportunity



This button is used to create a Proposal Workspace that is not associated to an Opportunity. To create a Proposal Workspace that is associated to an Opportunity, the Proposal Workspace screen must be launched via the [**Proposal**] button on the Opportunity screen, which has the Opportunity loaded.

Enter a suitable description and press [**Save**]. An identifying code is automatically assigned to the Proposal Workspace.

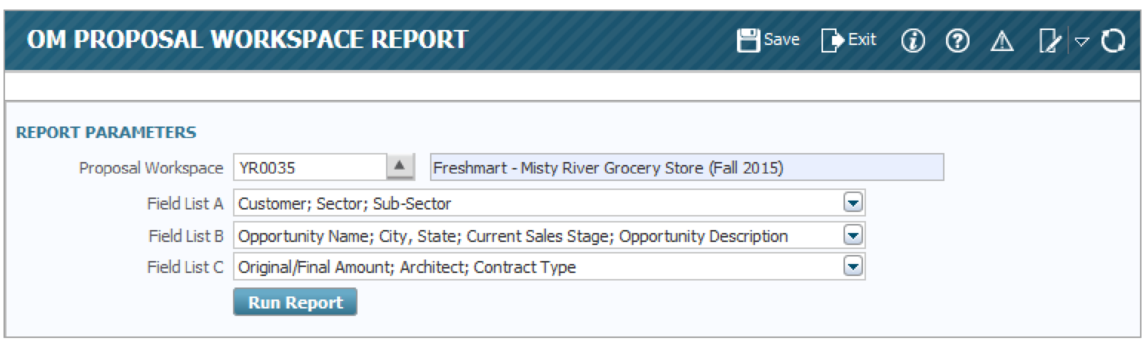
[**Copy Proposal**] – Button



This button is used to copy the contents of the Proposal Workspace selected via the **From Proposal** field to the currently loaded Proposal Workspace, displayed by the **To Proposal** field.

To append the contents of the selected Proposal Workspace (source) to the contents of the target Proposal Workspace (destination), select the **Add** radio button. To obliterate the contents of the target Proposal Workspace and replace it with the contents of the selected Proposal Workspace, select the **Replace** radio button. Click [**Copy**] to perform the copying.

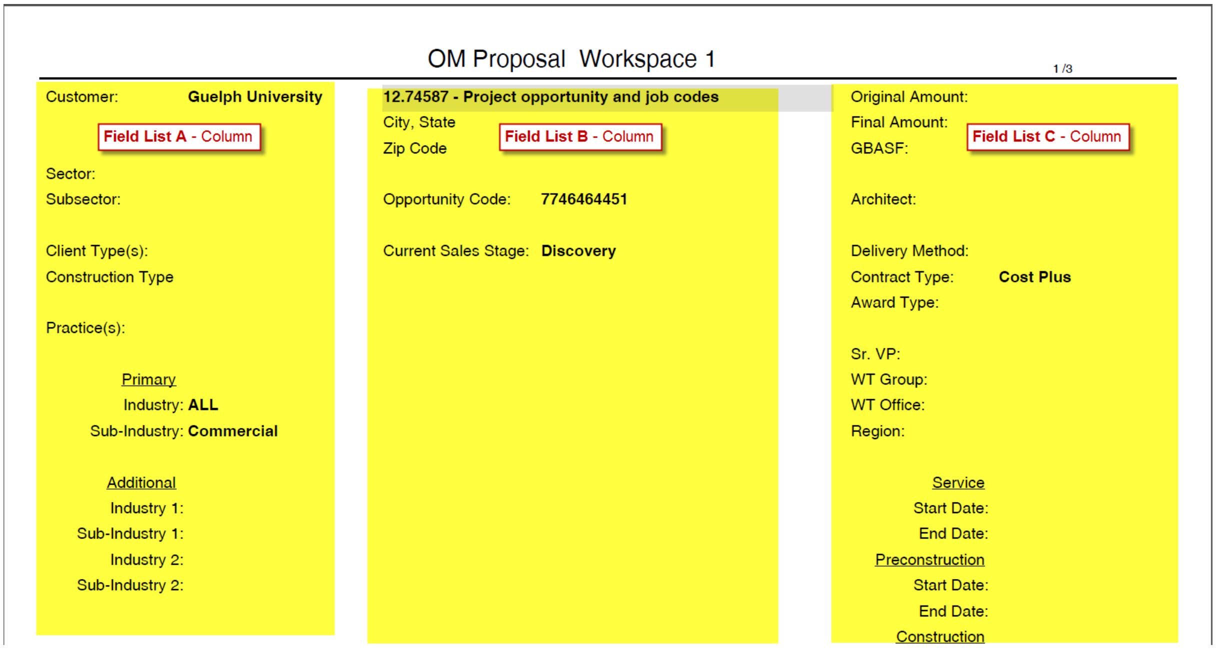
[**Print**] – Button



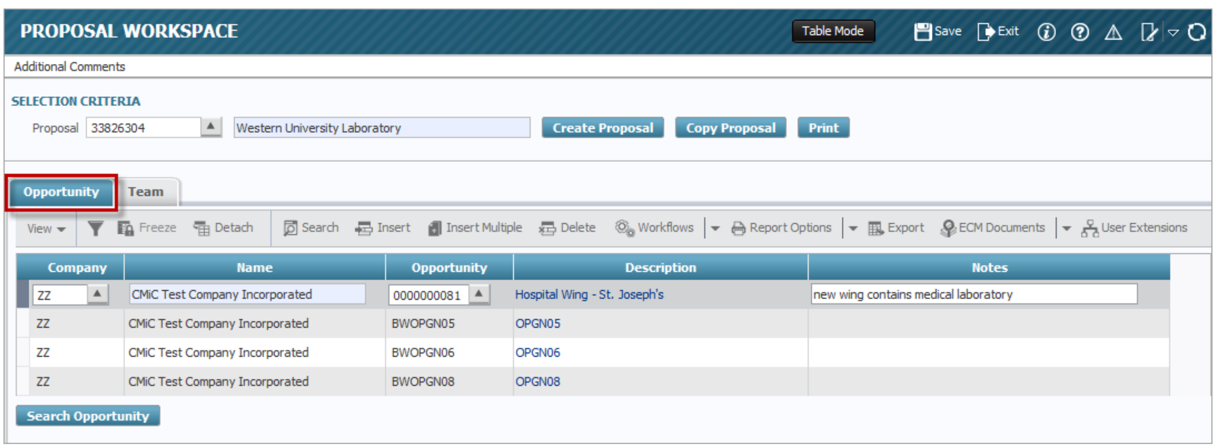
This button is used to print a Proposal Workspace report, which displays selected information about the Proposal Workspace's contained Opportunities and Key Players.

To print a Proposal Workspace report, select the Proposal Workspace to generate the report for via the **Proposal Workspace** field. Then, select which fields to display information for, using the **Field List A**, **Field List B** and **Field List C** fields. If no selection is made, all fields will be shown on the report.

Each field list corresponds to a vertical column on the report, with **Field List A** being the left-most column, **Field List B** the center column, and **Field List C** the right-most column, as illustrated by the following sample report, which has no parameters selected (all fields are displayed):



Opportunity – Tab



The **Opportunity** tab lists the Opportunities that have been added to the current Proposal, displayed by the **Proposal** field.

NOTE: Only Opportunities that have an associated Job record, not just a Bid Job, can be added to the list of Opportunities. This restriction helps ensure the credibility of the Opportunities used for reference purposes.

The Opportunity's name, under the **Description** column, is a link that launches the Opportunity screen to view the corresponding Opportunity on a new browser tab.

The **Notes** fields can be used to provide information about why the Opportunity is in the list, or any other relevant information, such as the level of its success.

Options to Search for & Add Relevant Opportunities to Proposal Workspace

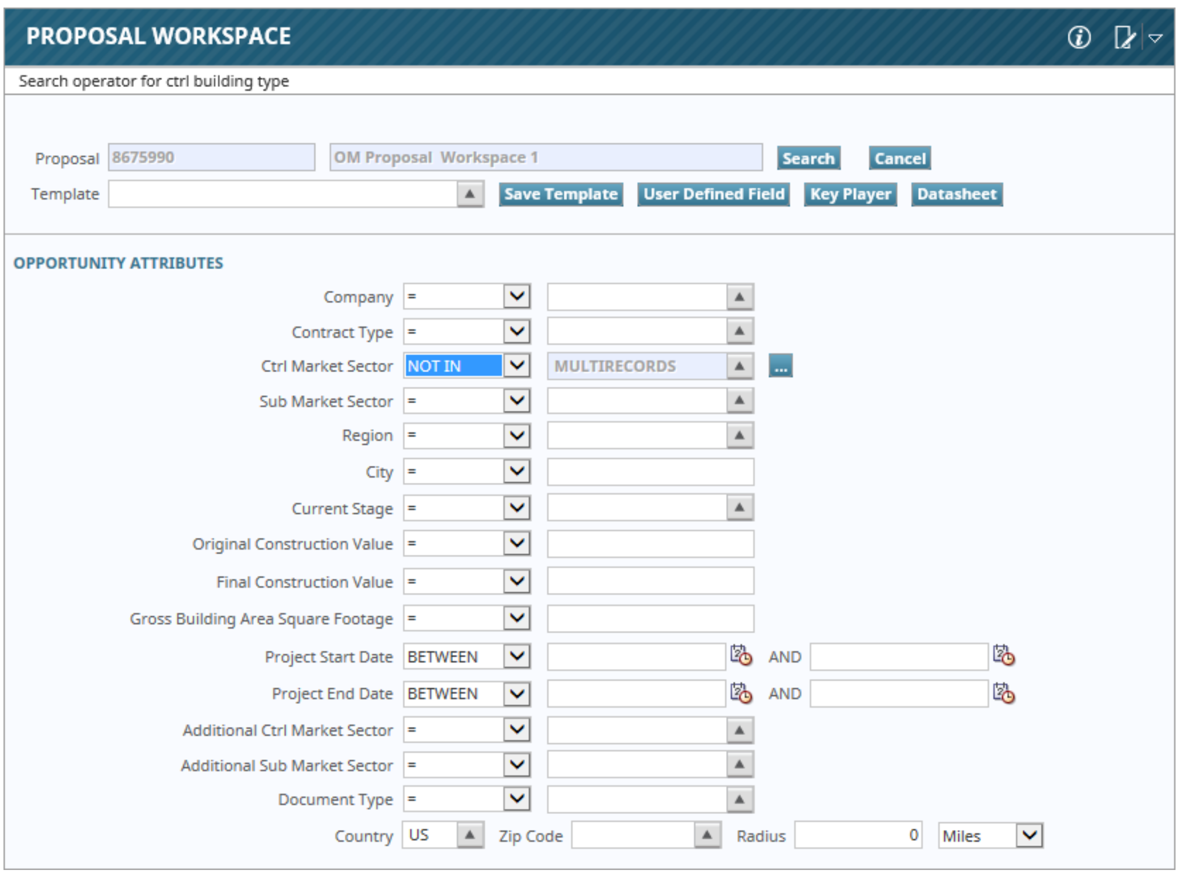
Reminder: Only Opportunities that have an associated Job record, not just a Bid Job, can be searched against and added to the list of similar Opportunities.

There are two options that can be utilized to search for and add relevant Opportunities to the Proposal Workplace's **Opportunity** tab.

The [**Insert**] or [**Insert Multiple**] buttons of the Block Toolbar can be used to insert new rows into the list, then the **Company** and **Opportunity** fields of the new rows can be used to quickly select relevant Opportunities.

Alternatively, the pop-up launched by the [**Search Opportunity**] button can be used for more advanced searches of relevant Opportunities. The pop-up is used to create a composite search to search against the standard fields, user defined fields, Datasheet fields, and Key Players of Opportunities. Refer to the following section for further details about the composite search.

[**Search Opportunities**] – Composite Search for Relevant Opportunities



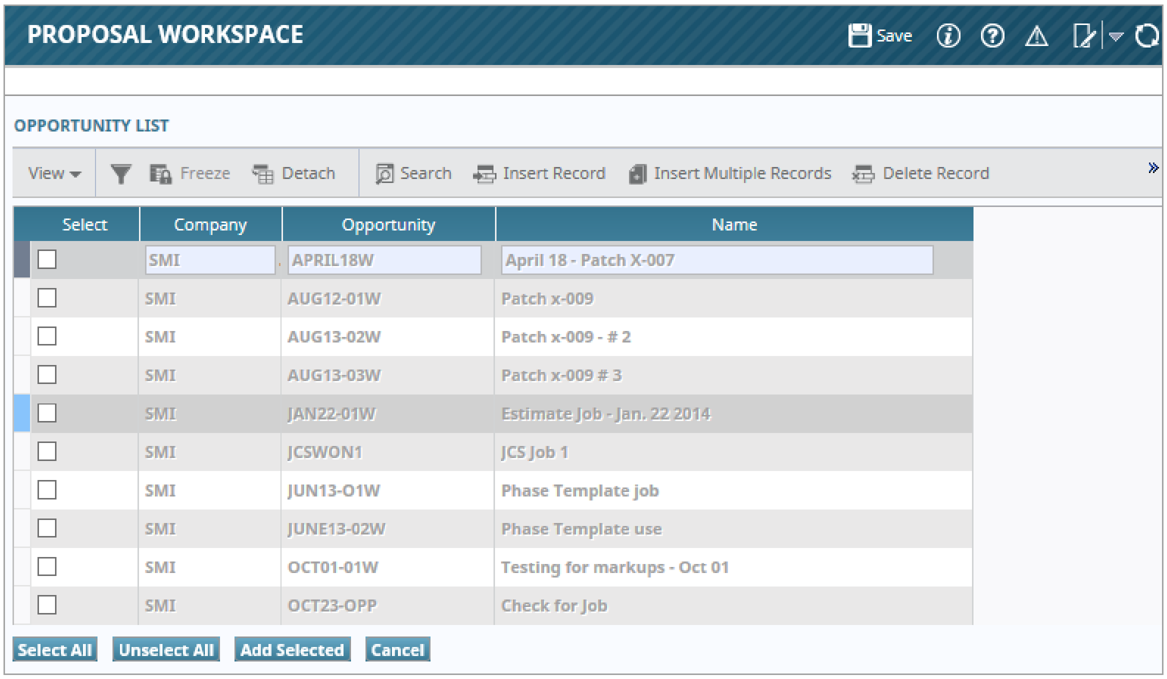
The [**Search Opportunities**] button launches a pop-up, shown above, to search for and add relevant Opportunities to the list. The pop-up allows searches to be made against:

- Standard fields of Opportunities (**Opportunity Attributes** section)
- User defined fields of Opportunities
- Fields of Opportunity Datasheet
- Key Players of Opportunities

For details about using the comparison operators (=, =<, >=, **BETWEEN**) and matching conditions (**IN**, **NOT IN**) on the pop-ups, please refer to the *Advanced Searches – Comparison Operators & Matching Conditions* section.

Basically, this pop-up is used to create a composite search using the standard fields under the **Opportunity Attributes** section, the user defined fields on the pop-up launched by the [**User Defined Field**] button, the Datasheet fields on the pop-up launched by the [**Datasheet**] button, and the list on the pop-up launched by the [**Key Player**] button. After all of the search parameters have been entered under the **Opportunity Attributes** section and through the pop-ups, the [**Search**] button is used to initiate the search.

[**Search**] – Button



After all of the search parameters have been entered under the **Opportunity Attributes** section and through the pop-ups, the [**Search**] button is used to initiate the search. A pop-up will appear, shown above, listing the Opportunities that satisfied the search parameters. Select the Opportunities to add, using the flags under the **Select** column, and click [**Add Selected**] to add them to the Proposal Workspace.

NOTE: If a search's returned results are not as expected, it may be due to forgotten search parameters entered and saved via one of the pop-ups used to add search parameters to the composite search.

[**Cancel**] – Button

Used to cancel the search, to return to the previous screen.

Template – Drop-Down Field

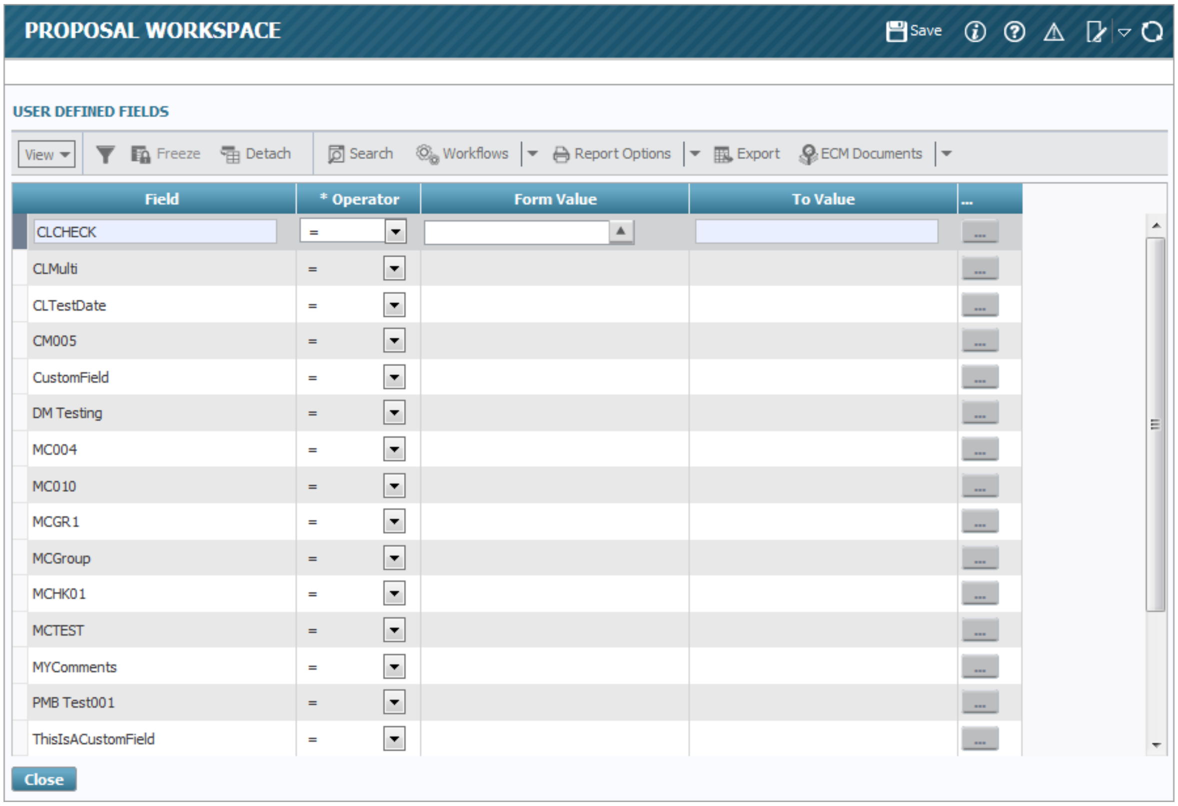
This drop-down field is used to load a saved composite search, saved via the [**Save Template**] button.

[**Save Template**] – Button

This button is used to save the composite search, as entered via the **Opportunity Attributes** section and the pop-ups. This is done by providing a name for the search using the **Template** field, then clicking this button.

To load the saved composite search, use the **Template** field to select it.

[**User Defined Field**] – Button: Search Against User Defined Fields of Opportunities

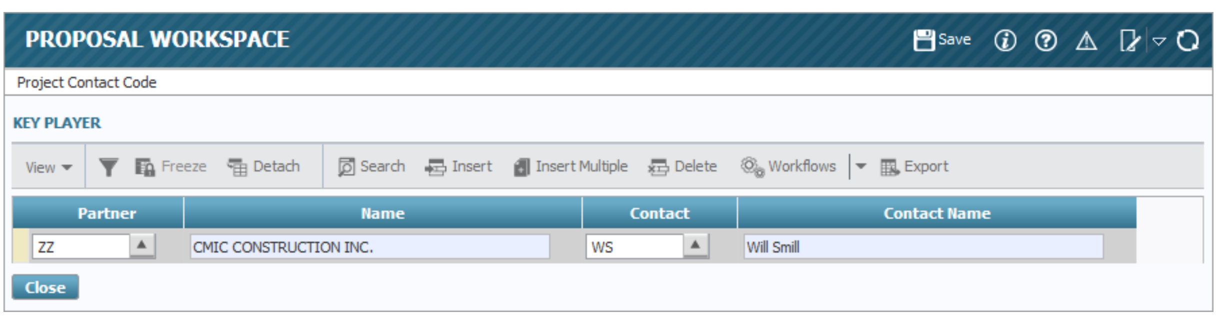


The pop-up launched by the [**User Defined Field**] button, shown above, lists search parameters that correspond to the user defined fields set up for Opportunity records.

After entering the search parameters to be made against an Opportunity's user defined fields, click [**Save**] to add them to the composite search and to save them to the loaded Proposal Workspace. As an example of a composite search, if search parameters were entered against an Opportunity's standard fields and against its user defined fields, only Opportunities satisfying both sets of search parameters will be returned.

To run the composite search, click the [**Search**] button on the previous, main pop-up.

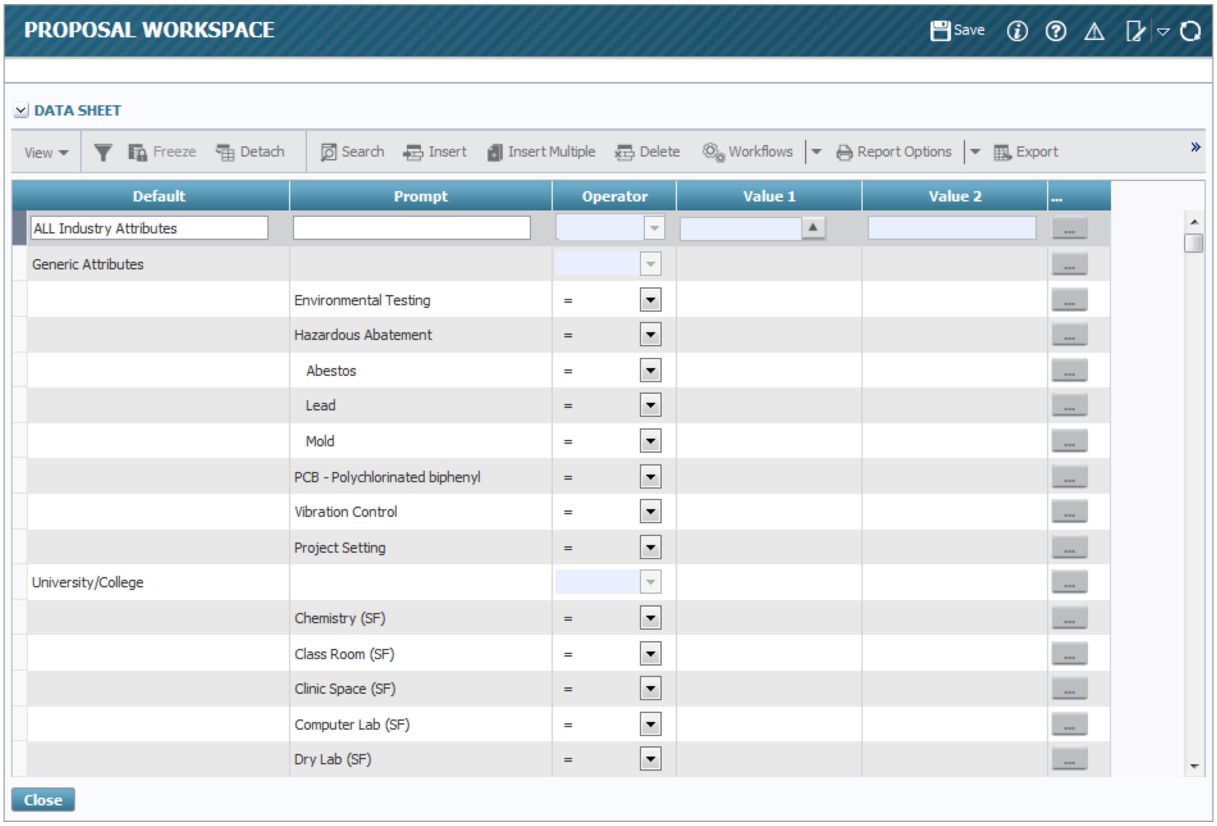
[**Key Player**] **–** Button: Search Against Key Players



The pop-up launched by the [**Key Player**] button, shown above, provides a table to insert Contacts. After the Contacts are entered, click [**Save**] to add them to the composite search.

When the composite search is run, using the [**Search**] button from the previous pop-up, Opportunities that had these Contacts as members of their Key Players team, and matched all of the other entered search parameters, will be returned.

[**Datasheet**] **–** Button: Search Against Fields of Opportunity's Datasheet

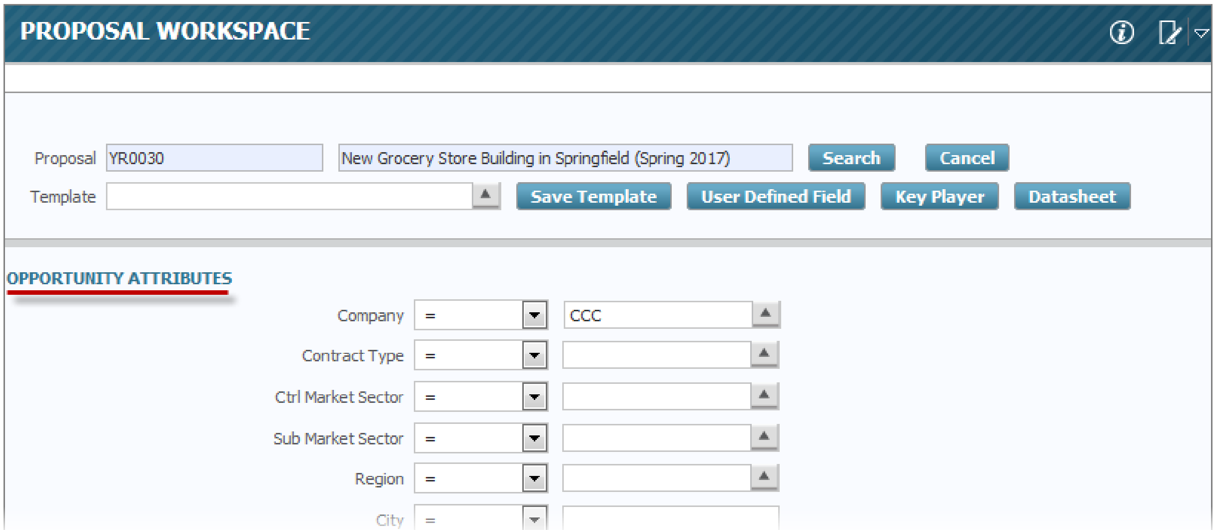


The pop-up launched by the [**Datasheet**] button, shown above, lists search parameters that correspond to the fields set up for Opportunity Datasheets.

After entering the search parameters to be made against an Opportunity's Datasheet fields, click [**Save**] to add them to the composite search, which is saved for the loaded Proposal Workspace. So, if search parameters were entered against an Opportunity's standard, user defined, and Datasheet fields, only Opportunities satisfying all sets of search parameters will be returned.

To run the composite search, click the [**Search**] button on the previous, main pop-up, which is used to create composite searches.

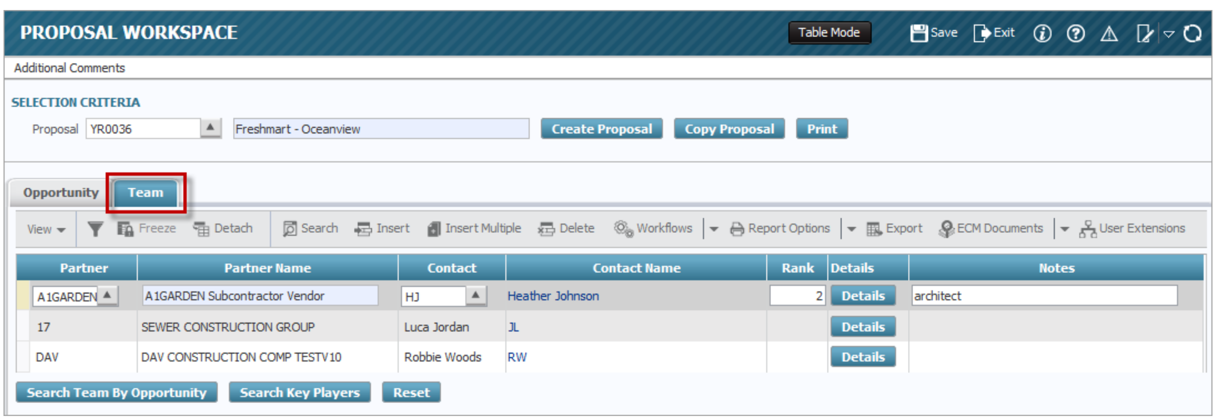
Opportunity Attributes – Section: Search Against Standard Opportunity Fields



The search parameters under the **Opportunity Attributes** section, shown above, correspond to the fields of Opportunity records that are applicable to searching for relevant Opportunities. The entered search parameters under this section are added to the composite search created via this main pop-up.

To run the composite search, click the [**Search**] button on this main pop-up.

Team – Tab



The **Team** tab displays the list of potential Key Players that have been added to the current Proposal, displayed by the **Proposal** field.

The **Contact Name** field is a link that launches the Contact screen to view the corresponding Contact on a new browser tab.

The **Rank** field indicates how relevant the Contact is to the new Opportunity, as a potential member of its Key Player team. This field is automatically filled in when a Contact is added from a search result, however, this field is editable, and its values can be set as desired. After a Contact is added via a search (as opposed to being added via the **Insert** options on the Block Toolbar), this field indicates how many Opportunities matched the search parameters and had the Contact as a Key Player. If the Contact played multiple roles for a single Opportunity, the rank is only increased by 1. To view the Opportunities the Contact worked on, which matched the search parameters, click the [**Details**] button.

The **Notes** fields can be used to provide information about the Contact, such as why the Contact is in the list.

The [**Details**] button is used to display the Opportunities the Contact worked on.

The [**Rest**] button, under the table, removes all entries from this tab's table (list). To remove a selected entry instead, use the Block Toolbar's [**Delete Record**] button.

Options to Search for & Add Relevant Key Players to Proposal Workspace

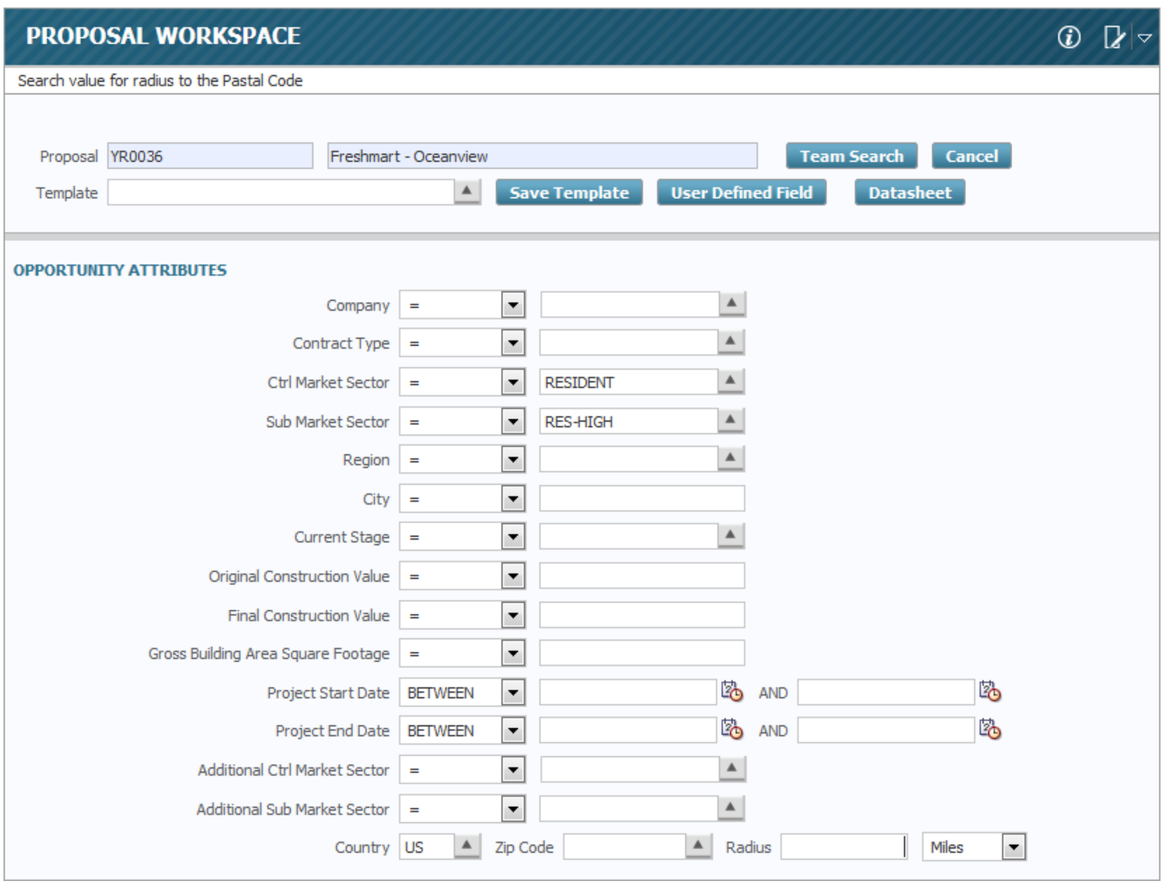
There are three options that can be utilized to search for and add relevant, potential Key Players to the Proposal Workplace's **Team** tab, to reference when compiling the new Opportunity's Key Player team.

To add a known potential Key Player without doing a search, simply use the [**Insert**] button on the Block Toolbar to insert a new row into the list (table), then use the new row's **Partner** and **Contact** fields to quickly select the relevant Key Player.

The pop-up launched by the [**Search Team By Opportunity**] button is used to create a composite search to search for Key Players that were Key Players for relevant Opportunities, allowing searches against the standard fields, user defined fields, and Datasheet fields of Opportunities. In searching for Key Players that worked on particular Opportunities, only Opportunities that have an associated Job record, not just a Bid Job, can be searched against.

The pop-up launched by the [**Search Key Players**] button is used to search for Key Players that worked with particular Companies or Partners.

[**Search Team By Opportunity**] – Composite Search for Potential Key Players

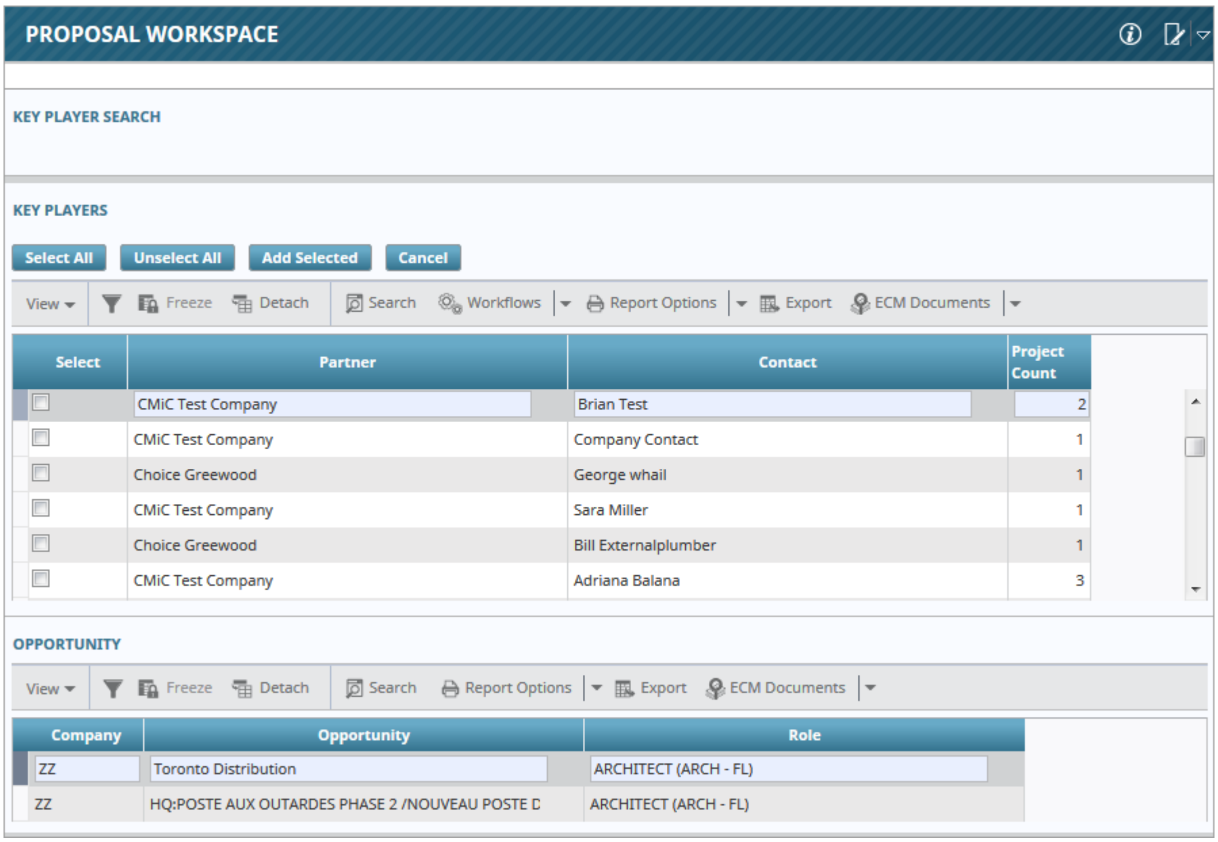


The [**Search Team By Opportunity**] button's pop-up, shown above, is used to create a composite search to return potential Key Players, which worked on relevant Opportunities. The composite search is created using the standard fields under the **Opportunity Attributes** section, the user defined fields on the pop-up launched by the [**User Defined Field**] button, and the Datasheet fields on the pop-up launched by the [**Datasheet**] button. After all of the search parameters have been entered under the **Opportunity Attributes** section and through the pop-ups, the [**Search**] button is used to initiate the search.

REMINDER: In searching for the Key Players of relevant Opportunities, only Opportunities that have an associated Job record, not just a Bid Job, can be searched against.

For details about using the comparison operators (=, =<, >=, **BETWEEN**) and matching conditions (**IN**, **NOT IN**) on the pop-ups, please refer to the *Advanced Searches – Comparison Operators & Matching Conditions* subsection.

[**Team Search**] – Button



After all of the search parameters have been entered under the **Opportunity Attributes** section and through the pop-ups, this button is used to initiate the search. A pop-up will appear, shown above, listing the Key Players that worked on the matched Opportunities. Select the Key Players to add and click [**Add Selected**] to add them to the Proposal Workspace.

NOTE: If a search's returned results are not as expected, it may be due to forgotten search parameters entered via one of the pop-ups used to add search parameters to the composite search.

The lower table, under the **Opportunity** section, lists the Opportunities for which the Contact selected in the upper section worked.

[**Cancel**] – Button

Used to cancel the search, to return to the previous screen.

Template – Drop-Down Field

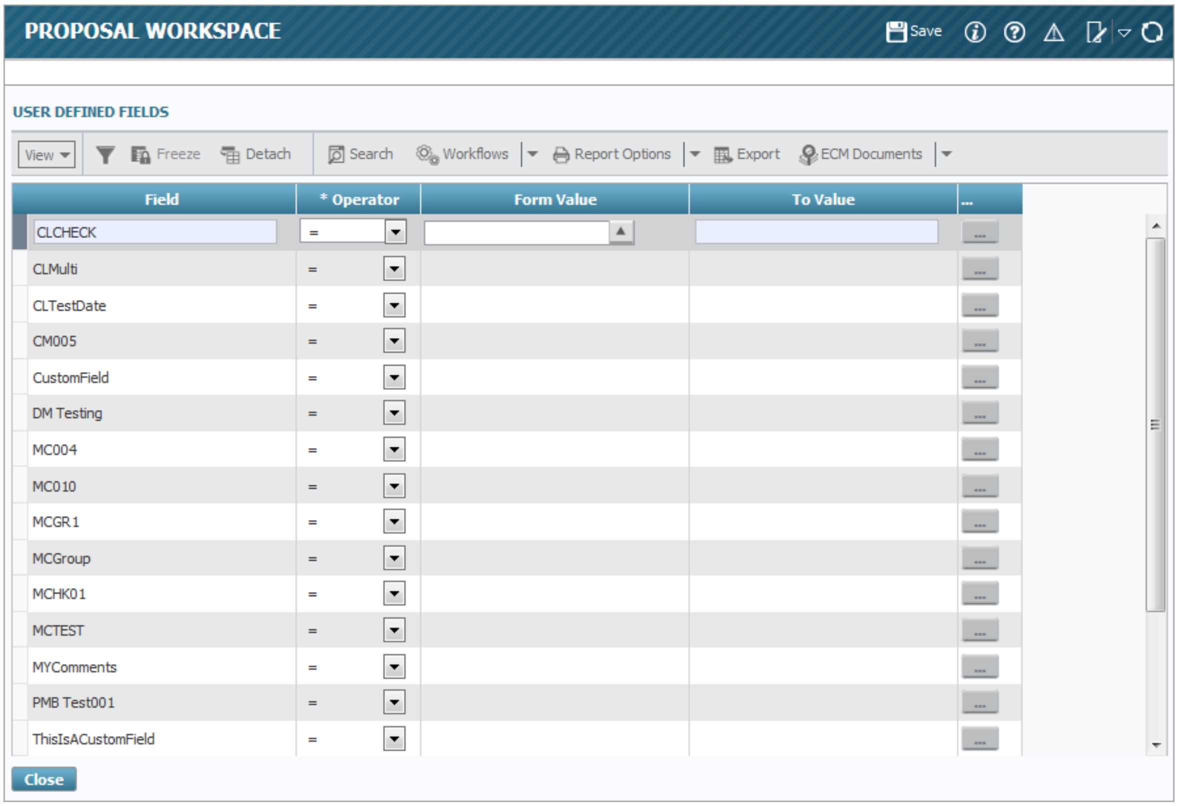
This drop-down field is used to load a saved composite search, saved via the [**Save Template**] button.

[**Save Template**] – Button

This button is used to save the composite search, as entered via the **Opportunity Attributes** section and the pop-ups. This is done by providing a name for the search using the **Template** field, then clicking this button.

To load the saved composite search, use the **Template** field to select and load it.

[**User Defined Field**] – Button: Search Against User Defined Fields of Opportunities

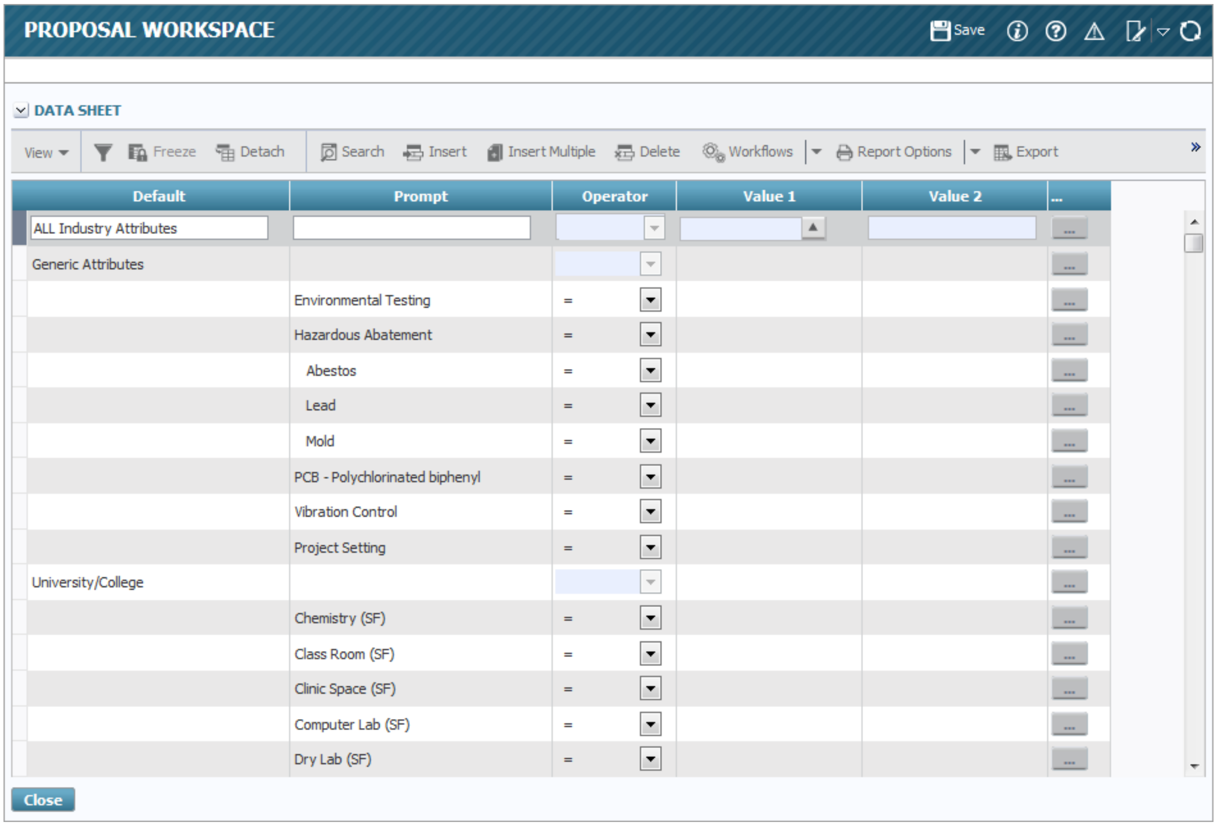


The pop-up launched by the [**User Defined Field**] button, shown above, lists search parameters that correspond to the user defined fields set up for Opportunity records.

After entering the search parameters to be made against an Opportunity's user defined fields, click [**Save**] to add them to the composite search and to save them to the loaded Proposal Workspace. As an example of a composite search, if search parameters were entered against an Opportunity's standard fields and against its user defined fields, only Opportunities satisfying both sets of search parameters will be returned.

To run the composite search, click the [**Team Search**] button on the previous, main pop-up.

[**Datasheet**] **–** Button: Search Against Fields of Opportunity's Datasheet

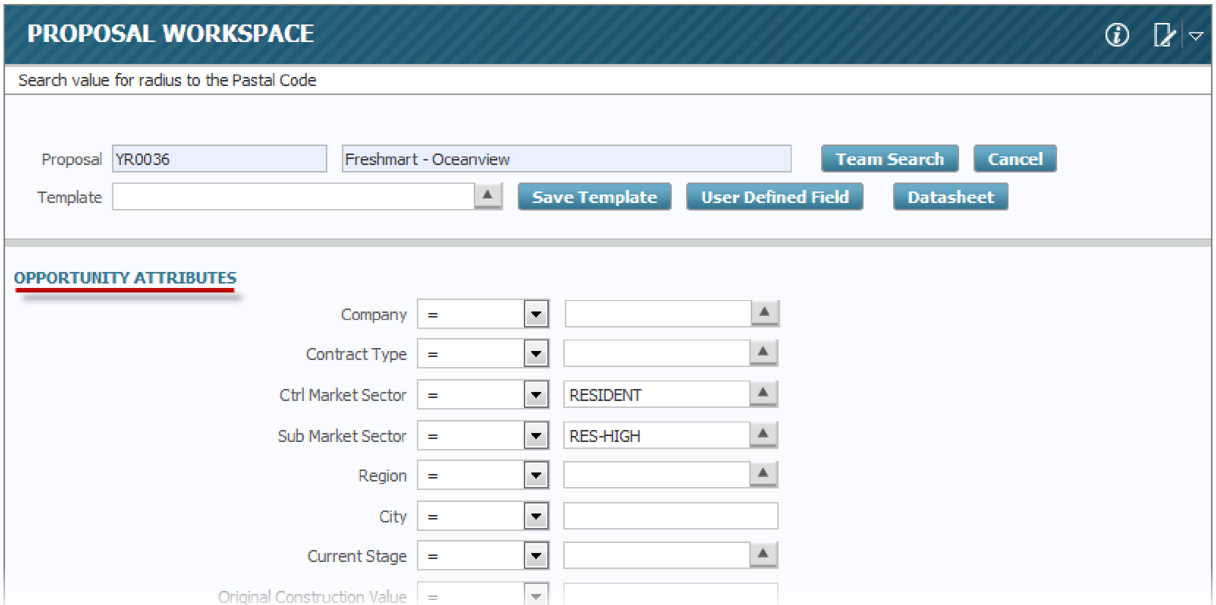


The pop-up launched by the [**Datasheet**] button, shown above, lists search parameters that correspond to the fields set up for Opportunity Datasheets.

After entering the search parameters to be made against an Opportunity's Datasheet fields, click [**Save**] to add them to the composite search and to save them to the loaded Proposal Workspace. So, if search parameters were entered against an Opportunity's standard, user defined, and Datasheet fields, only Opportunities satisfying all sets of search parameters will be returned.

To run the composite search, click the [**Search**] button on the previous, main pop-up.

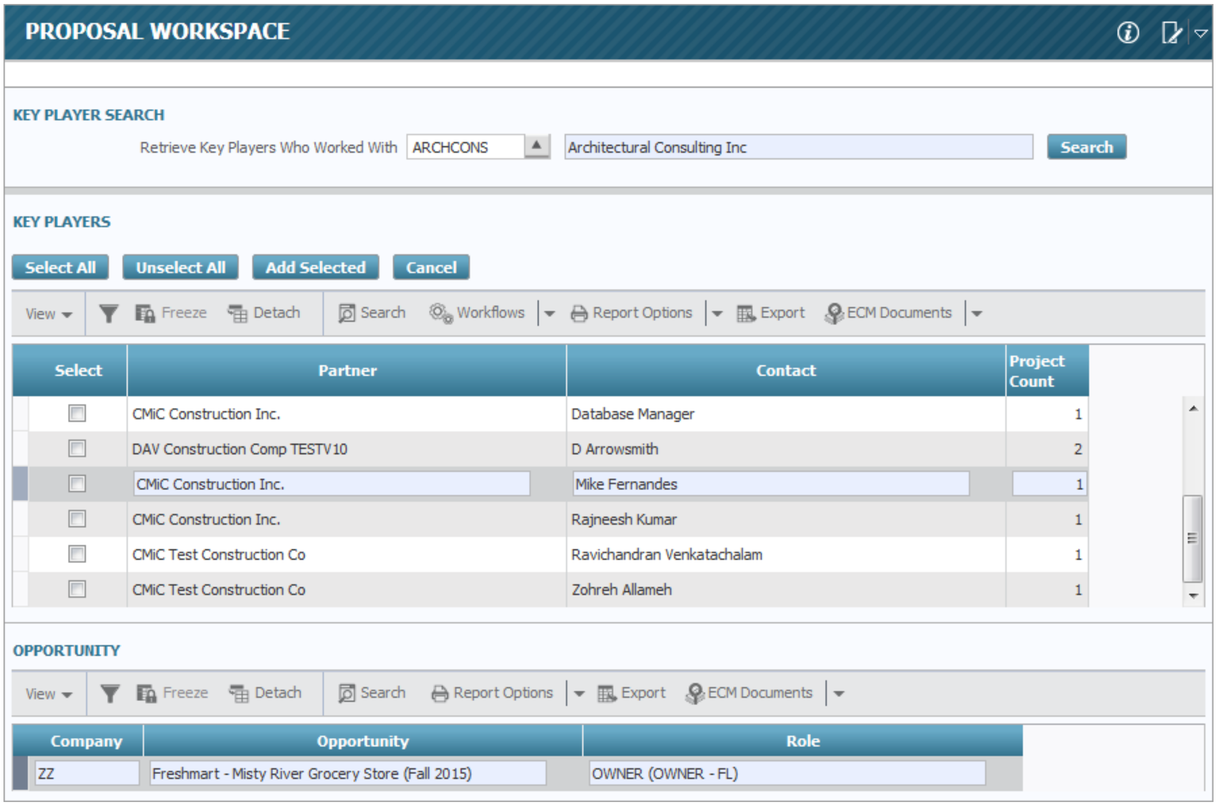
Opportunity Attributes – Section**:** Search Against Standard Opportunity Fields



The search parameters under the **Opportunity Attributes** section, shown above, correspond to the fields of Opportunity records that are applicable to searching for relevant Opportunities. The entered search parameters under this section are added to the composite search created via this main pop-up.

To run the composite search, click the [**Team Search**] button on this main pop-up.

[**Search Key Players**] – Search for Key Players Who Worked with Key Players Belonging to Specified Company/Partner



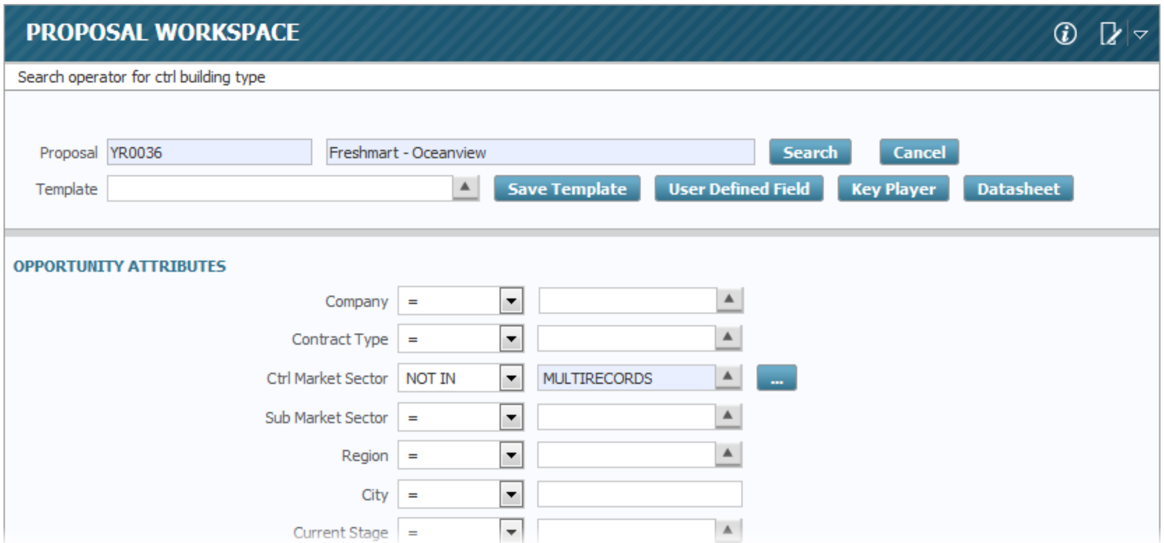
*Shown above is the Key Player Search pop-up, launched by clicking the [**Search Key Players**] button.*

The Key Player Search popup is used to search for all Key Players who have worked with Key Players belonging to a selected Company/Partner, as members of the same project management team (Key Players Team). Only Key Players that have worked with Key Players belonging to the selected Company/Partner will be returned. The Company/Partner is selected via the **Retrieve Key Players Who Worked With** field.

Click [**Search**] to initiate the search, and all Key Players who worked with Key Players belonging to the selected Company/Partner will be listed under the **Key Players** section. The **Project Count** field indicates the number of Projects for which the returned Key Player worked with Key Players belonging to the selected Company/Partner.

Using the flags under the **Select** column, select the Key Players to add, and click [**Add Selected**] to add them to Proposal Workspace.

The lower table, under the **Opportunity** section, shows details about the Key Player (**Contact**) selected in the upper table. It lists the Opportunities for which the selected Key Player worked with Key Players belonging to the Company/Partner selected via the **Retrieve Key Players Who Worked With** field. The **Role** field indicates the role played by the selected Key Player for the corresponding Opportunity.

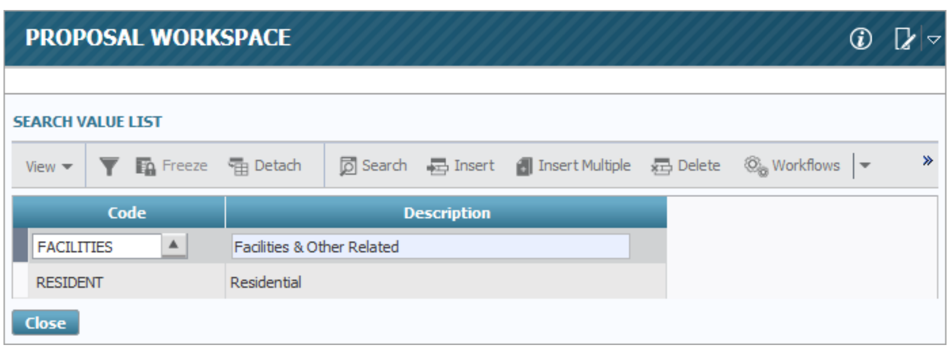


On screens that have search parameters using comparison operators (=, =<, >=, **BETWEEN**) or matching conditions (**IN**, **NOT IN**), the first drop-down list is used to select a comparison operator or a matching condition, and the second field is used to provide a value for the operator or condition.

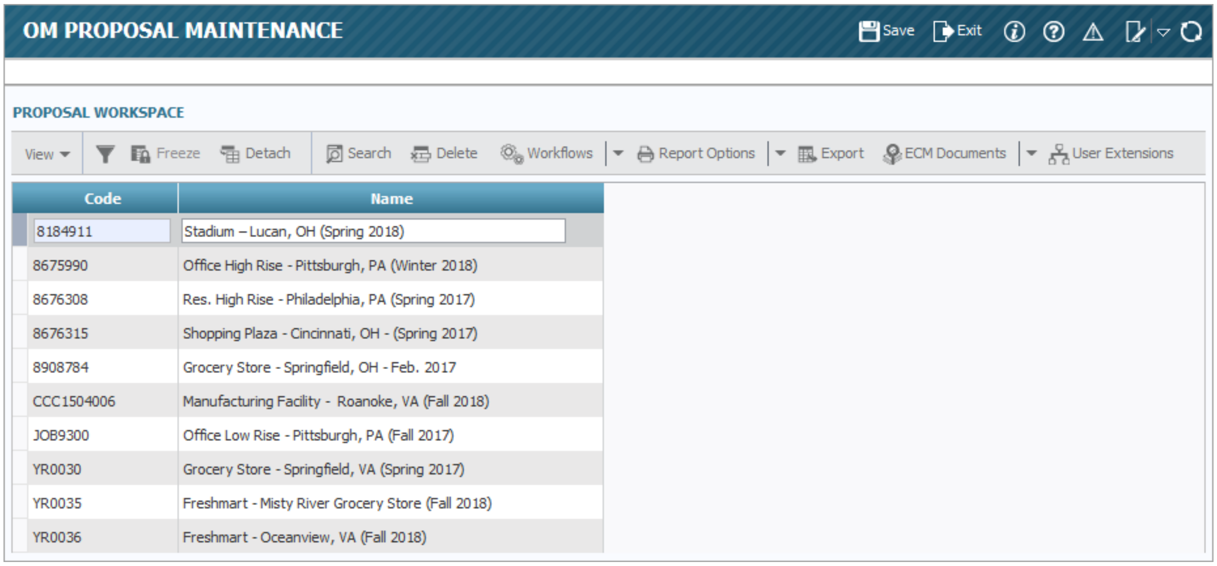
Example

Consider the following search parameter, which uses the **NOT IN** condition (first parameter) and a list of values to compare against (second parameter):

An Opportunity will be returned by this search if its controlling market sector does not match any of the specified values contained in the second drop-down list, which is displayed by the pop-up (shown below) launched by clicking the corresponding  button.



Proposal Workspace Maintenance

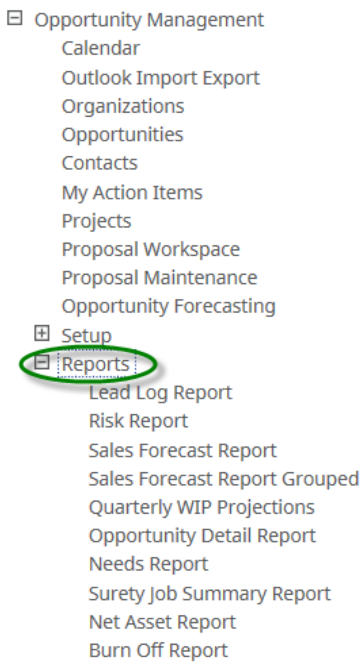


*Sample of Proposal Workspace Maintenance screen; standard Treeview path: **OM > Proposal Maintenance***

The Proposal Workspace Maintenance screen is used to delete or change the name of a created Proposal Workspace. After deleting or changing the name of a Proposal Workspace, click [**Save**] to commit the change.

Reports

Reporting Overview

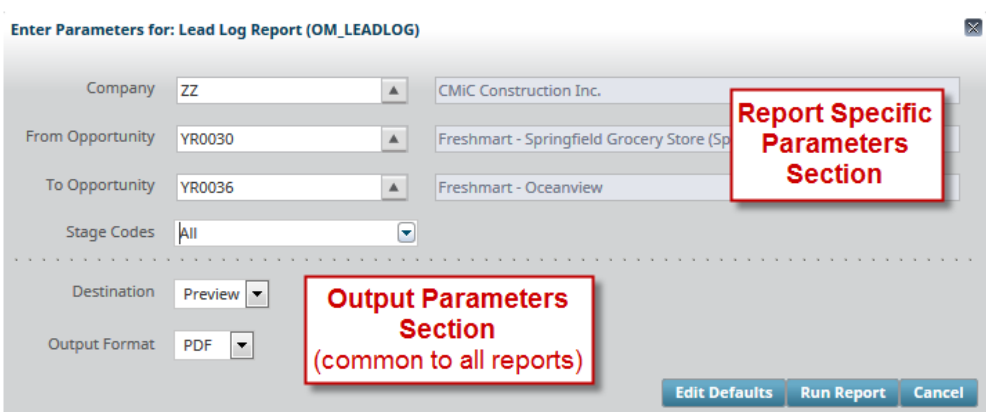


The Opportunity Management module offers reports that can be produced to examine Leads, Sales Forecasts and a general Scorecard type of analysis.

Note that some reports are designed to be printed on landscape Legal sized paper. Depending on your settings in Adobe Reader, however, they can be printed from Preview to either Legal or Letter size (reduced text size).

The Financial Project Reports are best printed to Ledger Paper, however may also be printed to Legal size.

Report's Common Output Parameters



Sample of Printing Options screen for parameter entry

The following table provides details about the Output Parameters section's parameters (lower, labeled section), which is common to all Printing Options screens:

Destination	The **Destination** field is used to specify the report's output. **Preview** displays the report on a new tab of your web browser, and the browser is used to print the report, set printer settings if necessary, or to save (download) the report to a desired location. **Email** brings up an Email window for emailing the report. Further details are provided in the following "Reporting" section.
Output Format	The **Output Format** field is used to specify the report's file format.

Report Outputs: Preview, Print, Email, & Save to File

NOTE: Ensure your web browser is set to allow pop-ups for the server running CMiC Enterprise, as reports are displayed on new browser tabs.

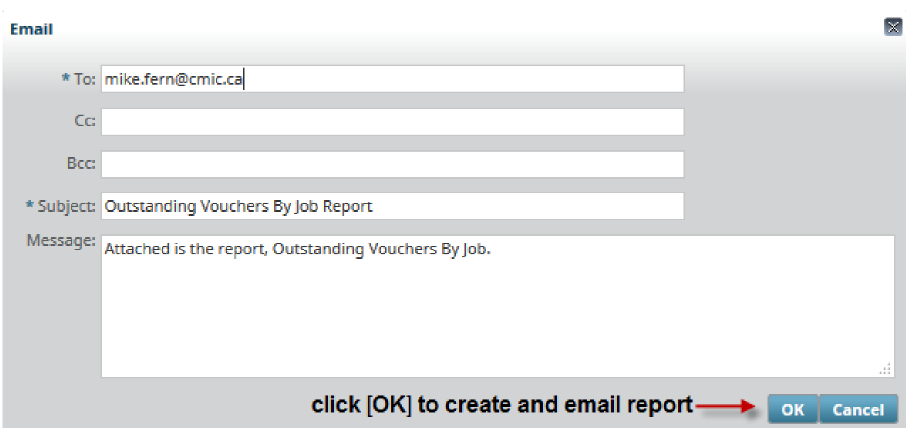
Preview & Print

Select **Preview** from the **Destination** field of the Reporting Options window, and use the **[Run Report**] option to preview the report on a new tab of your web browser. From the browser, select its printing option to bring up the print settings window to print the report.

Preview & Save Report to File

Select **Preview** from the **Destination** field of the Reporting Options window, and use the **[Run Report**] option to preview the report on a new tab of your web browser. From the browser, select the save or download option, depending on your browser, to bring up a window to navigate to a location to save the report.

E-Mail Report



Select **E-Mail** from the **Destination** drop-down list of the Reporting Options window, and select the report's format (PDF, HTML, Excel, RTF, CSV) using the **Output Format** drop-down list. Next, click the [**Run Report**] button to bring up the Email window, as shown above, to enter the email information. To enter more than one address, use a comma as a separator. Click [**OK**] to create and send the report via Email.

Lead Log

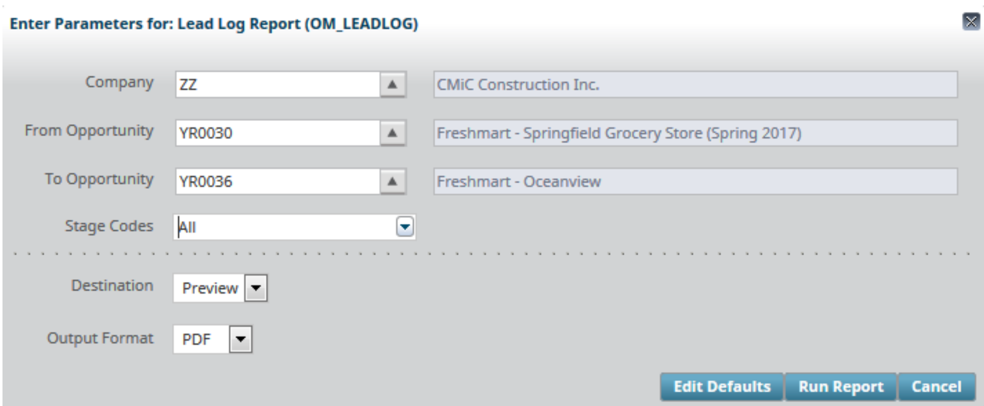
ZZ - CMiC Construction Inc.
OPPORTUNITY MANAGEMENT - LEAD LOG FOR YR0030 TO YR0036

Page: 1 of 1
Date: Sep 03, 2015
Time: 06:14 PM

Market Sector	Opportunity No.	Opportunity Name	Description	Contract Type	Customer	On Sales Forecast	Volume	Earnings	Earnings(%)	Odds to Get	Stage
Commercial	YR0030	Freshmart - Springfield Grocery Store (Spring 2017)	Freshmart Groceries is looking to build a new grocery store in Springfield in Spring of 2017. Around 45 000 sq. feet	COST_PLUS	Freshmart Groceries Inc.		1,185,000	303,360	25.60	80	Prospect Qualification
Commercial	YR0031	Freshmart - Dundas Grocery Store (Spring 2016)	Build new grocery store in Dundas for Freshmart Groceries Inc. in Spring 2016. Around 48 000 sq. feet.	COST_PLUS	Freshmart Groceries Inc.		1,095,000	280,320	25.60		Prospect Qualification
Commercial	YR0032	Freshmart - Orangeville Grocery Store (Fall 2015)	Build grocery store in Orangeville for Fall 2015, with attached greenhouse. Around 56 000 sq. feet.	COST_PLUS	Freshmart Groceries Inc.	Y	1,280,000	311,400	24.33		Presentation
Commercial	YR0033	Freshmart - Fairview Grocery Store (Spring 2016)	Build grocery store in Fairview for Spring of 2016. Around 45 000 sq. feet.	COST_PLUS	Freshmart Groceries Inc.		985,000	251,175	25.50		Prospect Qualification
Commercial	YR0035	Freshmart - Misty River Grocery Store (Fall 2015)	Build grocery store in Misty River for Spring of 2016. Around 45 000 sq. feet.	COST_PLUS	Freshmart Groceries Inc.		994,000	253,470	25.50		Prospect Qualification
Commercial	YR0036	Freshmart - Oceanview	Build grocery store in Oceanview for Spring of 2016, with attached greenhouse. Around 55 000 sq. feet.	COST_PLUS	Freshmart Groceries Inc.		1,300,000	335,400	25.80		Prospect Qualification

The Lead Log Report is a legal sized paper report, produced for a specified Range of Opportunities, and reports on the potential earnings from the specified opportunities.

Run Report



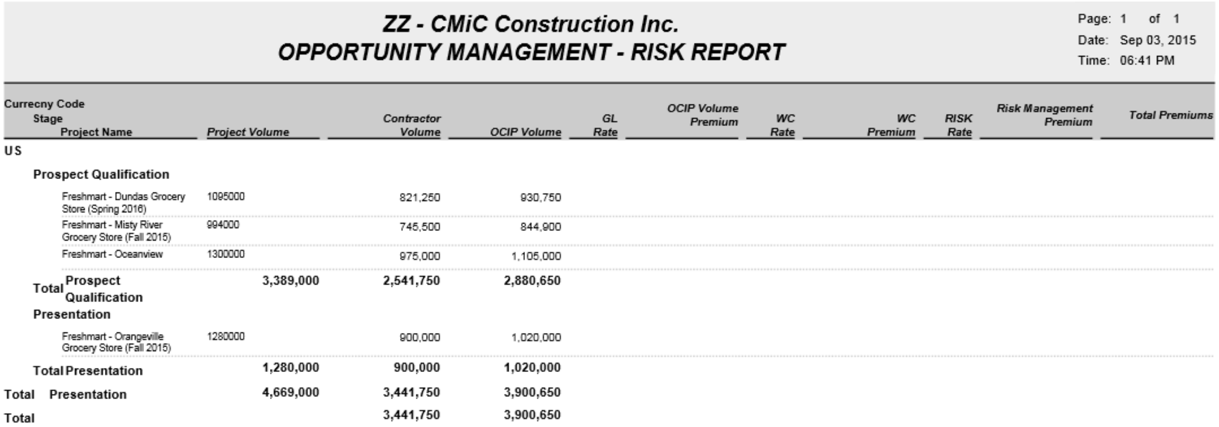
Printing Options screen for Lead Log report.

To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

The following table provides details about the parameters used to generate this report:

Company	Company handling opportunities.
From Opportunity	Optional; if left blank, taken to be first opportunity, by code. Specifies which opportunity to start with, by Opportunity Code.
To Opportunity	Optional; if left blank, taken to be last opportunity, by code. Specifies which opportunity to end with, by Opportunity Code.
Stage Codes	Which Opportunity sales stages to include in report; by default, none are selected. Opportunity's sales stage specified by its **Current Sales Stage** (**General** tab of Opportunity screen) field.

Risk Report



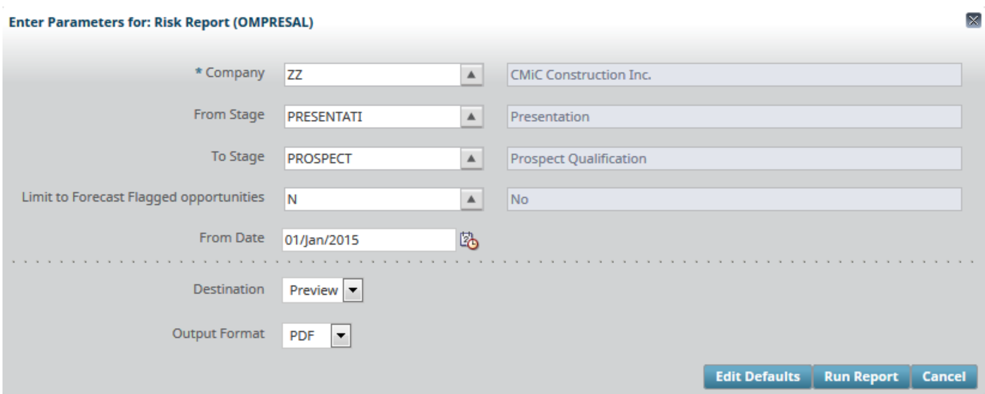
ZZ - CMiC Construction Inc.
OPPORTUNITY MANAGEMENT - RISK REPORT

Page: 1 of 1
Date: Sep 03, 2015
Time: 06:41 PM

Currecny Code / Stage / Project Name	Project Volume	Contractor Volume	OCIP Volume	GL Rate	OCIP Volume Premium	WC Rate	WC Premium	RISK Rate	Risk Management Premium	Total Premiums
US										
Prospect Qualification										
Freshmart - Dundas Grocery Store (Spring 2016)	1095000	821,250	930,750							
Freshmart - Misty River Grocery Store (Fall 2015)	994000	745,500	844,900							
Freshmart - Oceanview	1300000	975,000	1,105,000							
Total Prospect Qualification	3,389,000	2,541,750	2,880,650							
Presentation										
Freshmart - Orangeville Grocery Store (Fall 2015)	1280000	900,000	1,020,000							
Total Presentation	1,280,000	900,000	1,020,000							
Total Presentation	4,669,000	3,441,750	3,900,650							
Total		3,441,750	3,900,650							

The Risk Report is a legal sized paper report that presents the risk management information for opportunities, grouped by their sales stage.

Run Report



Printing Options screen for Risk Management report.

To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

The following table provides details about the parameters used to generate this report:

Company	Company handling projects associated to opportunities.
From Stage	Optional; if left blank, taken to be first sales stage, by code. Specifies which opportunity to start with, by Stage Code.
To Stage	Optional; if left blank, taken to be last sales stage, by code. Specifies which sales stage to end with, by Stage Code.
Limit to Forecast Flagged Opportunities	If you select "Yes", only opportunities with the **Include In Forecast** flag set to true will be included in the report. On the Opportunities screen, this flag is found in the **Opportunity Management** section, which is the main section for the screen. If you select "No", this flag is disregarded.
From Date	A date must be specified. Select the date to start with, for the opportunities.

Sales Forecast Report

GB - GB & Associates (TEST2006-GB)

OPPORTUNITY MANAGEMENT - 2005 SALES FORECAST

Page: 1 of 2
Date: 06/07/2007
Time: 01:55 PM

	2005 Annual Plan												
	Gross Sales		CY Work In Place										
Market Sector	Volume	Earnings	Volume	Earnings	Comp Code	Project Name	Odds To Get (%)	Start Date	Project Duration (months)	Contract Type	Project Volume	Fee (E/V)	Earnings
AIRPORTS - Airports and Related Services	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
COMMERCIAL - Commercial Building	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
EDUCATION - Educational Institutes	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
FEDERAL - Federal Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
FOOD - Food Service and Restaurants	$1,200,000.00	$564,780.00	$266,100.00	$26,801.00									
					GB	Won 2005, not Closed	100%	12/31/2005	5.00	FIXED FEE	$3,506,500.00	9.86	$345,650.00
					GB	2005 Oppo into 2006	100%	09/11/2005	5.00	STANDARD	$7,850,000.00	7.94	$623,000.00
					GB	Bid from 2005	100%	08/11/2005	4.00	STANDARD	$7,500,000.00	9.93	$745,000.00
											$18,856,500.00		$1,713,650.00
HIGHWAYS - Highways and Roads Development	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
MEDICAL - Medical and Hospitals	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
PROVINCIAL - Provincial Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
PUBLIC - Public Facilities	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RENOVATION - Renovation Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RESIDENCE - Residential Development	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RETAIL - Retail Outlets and Pad Stores	$3,000,000.00	$750,000.00	$1,200,000.00	$50,000.00									
					GB	2005 Bid Not Won	95%	10/20/2005	6.00	SERVICE	$205,000.00	9.51	$19,500.00
											$205,000.00		$19,500.00
TRANSPORT - Transportation	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
2005 Plan Total	$4,200,000.00	$1,314,780.00	$1,466,100.00	$76,801.00							$19,061,500.00		$1,733,150.00

This report can be run for a Consolidation Group or a single Company, for a calendar year. The report will display the stored Sales Plan information as well as the specific Project information for Opportunities that have been recorded against the same Market Sector classifications. Also, only opportunities with the **Include In Forecast** flag (found on main section of Opportunities screen) set to true will be included in this report.

The left side of the report details the Sales Plan information and includes:

Gross Sales Volume

Shows the Gross Sales Volume, as entered in the Sales Plan for the Year and Market Sector.

Gross Sales Earnings

Shows Gross Sales Earnings, as entered in the Sales Plan for the Year and specific Market Sector.

CY Sales Volume

Current Year Sales Volume as entered in the Sales Plan for the Year and Market Sector.

CY Sales Earnings

Current Year Sales Earnings as entered in the Sales Plan for the Year and Market Sector.

The right side of the report is based on the entered Opportunities, matched to the specified Market Sectors, and includes only Opportunities that have been specified to be included in the Sales Forecast Report. All values are retrieved from the Opportunity screen and the calculated values include:

Fee (E/V)

This is calculated as the Earnings Amount divided by Project Volume times 100.

Earnings

This amount represents the Fee Percentage time Volume Amount divided by 100 and is meant to display the Fee less the Non-Reimbursable Fee.

NOTE: There are two possible Company Options for Fee Calculations. As such, if using a Consolidation Code which includes won Opportunities using Fee as Calculated on Cost vs. Calculated on Contract, two identically entered Opportunities may show different Fee Amounts.

Run Report

To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

NOTE: Only opportunities with the **Include In Forecast** flag set to true will be included in this report. On the Opportunities screen, this flag is found under its main section (**Opportunity Management**).

The following table provides details about the parameters used to generate this report:

Company	Company handling projects associated to opportunities.
From Department	Optional; if left blank, taken to be first department, by code. Specifies which department to start with, by Department Code.
To Department	Optional; if left blank, taken to be last department, by code. Specifies which department to end with, by Department Code.
Year	Year projects associated to opportunities

Sales Forecast Report Grouped

GB - GB & Associates (TEST2006-GB)

OPPORTUNITY MANAGEMENT - 2005 SALES FORECAST

Page: 1 of 2
Date: 06/07/2007
Time: 01:55 PM

	2005 Annual Plan												
	Gross Sales		CY Work In Place										
Market Sector	Volume	Earnings	Volume	Earnings	Comp Code	Project Name	Odds To Get (%)	Start Date	Project Duration (months)	Contract Type	Project Volume	Fee (E/V)	Earnings
AIRPORTS - Airports and Related Services	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
COMMERCIAL - Commercial Building	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
EDUCATION - Educational Institutes	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
FEDERAL - Federal Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
FOOD - Food Service and Restaurants	$1,200,000.00	$564,780.00	$266,100.00	$26,801.00									
					GB	Won 2005, not Closed	100%	12/31/2005	5.00	FIXED FEE	$3,506,500.00	9.86	$345,650.00
					GB	2005 Oppo into 2006	100%	09/11/2005	5.00	STANDARD	$7,850,000.00	7.94	$623,000.00
					GB	Bid from 2005	100%	08/11/2005	4.00	STANDARD	$7,500,000.00	9.93	$745,000.00
											$18,856,500.00		$1,713,650.00
HIGHWAYS - Highways and Roads Development	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
MEDICAL - Medical and Hospitals	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
PROVINCIAL - Provincial Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
PUBLIC - Public Facilities	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RENOVATION - Renovation Projects	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RESIDENCE - Residential Development	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
RETAIL - Retail Outlets and Pad Stores	$3,000,000.00	$750,000.00	$1,200,000.00	$50,000.00									
					GB	2005 Bid Not Won	95%	10/20/2005	6.00	SERVICE	$205,000.00	9.51	$19,500.00
											$205,000.00		$19,500.00
TRANSPORT - Transportation	$0.00	$0.00	$0.00	$0.00									
											$0.00		$0.00
2005 Plan Total	$4,200,000.00	$1,314,780.00	$1,466,100.00	$76,801.00							$19,061,500.00		$1,733,150.00

This report is similar to the Sales Forecast Report, except that it contains totals for each market sector. It can be run for a Consolidation Group or a single Company, for a calendar year. The report will display the stored Sales Plan information as well as the specific Project information for Opportunities that have been recorded against the same Market Sector classifications. Also, only opportunities with the **Include In Forecast** flag (found on main section of Opportunities screen) set to true will be included in this report.

The left side of the report details the Sales Plan information and includes the following information:

Gross Sales Volume

Shows the Gross Sales Volume, as entered in the Sales Plan for the Year and Market Sector.

Gross Sales Earnings

Shows Gross Sales Earnings, as entered in the Sales Plan for the Year and specific Market Sector.

CY Sales Volume

Current Year Sales Volume as entered in the Sales Plan for the Year and Market Sector.

CY Sales Earnings

Current Year Sales Earnings as entered in the Sales Plan for the Year and Market Sector.

The right side of the report is based on the entered Opportunities, matched to the specified Market Sectors, and includes only Opportunities that have been specified to be included in the Sales Forecast Report. All values are retrieved from the Opportunity screen and the calculated values include:

Fee (E/V)

This is calculated as the Earnings Amount divided by Project Volume times 100.

Earnings

This amount represents the Fee Percentage time Volume Amount divided by 100 and is meant to display the Fee less the Non-Reimbursable Fee.

NOTE: There are two possible Company Options for Fee Calculations. As such, if using a Consolidation Code which includes won Opportunities using Fee as Calculated on Cost vs. Calculated on Contract, two identically entered Opportunities may show different Fee Amounts.

Run Report

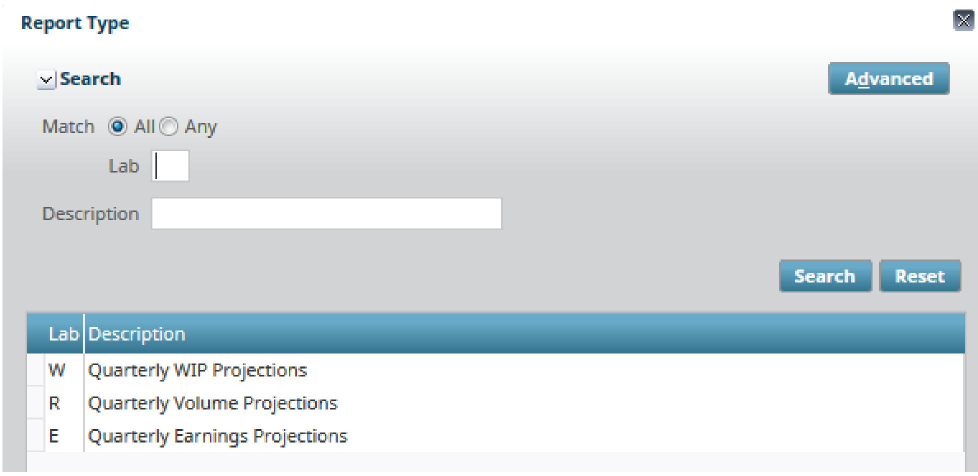
To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

NOTE: Only opportunities with the **Include In Forecast** flag set to true will be included in this report. On the Opportunities screen, this flag is found under its main section (**Opportunity Management**).

The following table provides details about the parameters used to generate the report:

Company	Company handling projects associated to opportunities.
From Department	Optional; if left blank, taken to be first department, by code. Specifies which department to start with, by Department Code.
To Department	Optional; if left blank, taken to be last department, by code. Specifies which department to end with, by Department Code.
Year	Year projects associated to opportunities

Quarterly WIP Projections



Report Type screen

There are three reports for the **Quarterly WIP Projections** report option. These reports will ask for the Consolidation Code or Company, Year, Period and which of the Reports will be generated. The data on the report will be based on Time Phased Projected amounts for periods greater than the run period, and for current and past periods, they will be based on actual values (primarily from WIP calculations). The report will start with the Quarter in which the run month exists, and will provide that full quarter plus the next 3 quarters resulting in a rolling 12 month reporting detail. An (**A**) value will appear next to each month heading that is based on Actual values.

Report Group Types:

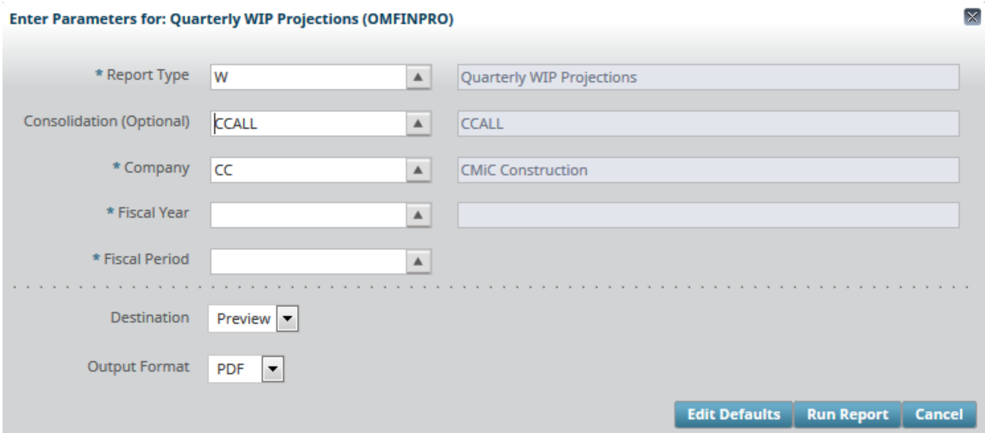
- **Backlog** – Work completed in the previous year
- **New Work** – Jobs with a Stored Contract Forecast
- **Sales** – Grouped by the Market Sector, this includes all Opportunities that have not been won/lost as well as not having a Stored Contract Forecast.

Flags similar to the standard WIP Report of the Job Costing module are also used for this report. These include:

* (Asterisk) Identification of a Job that has no Forecast Stored, with the values based on Time Phased Revenues.

\+ (Plus symbol) Identifies that the Job has had Costs prior to the Job Cost Start Date. (For example, Bidding Costs with dates prior to the Job Setup Start Date).

Run Report



To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

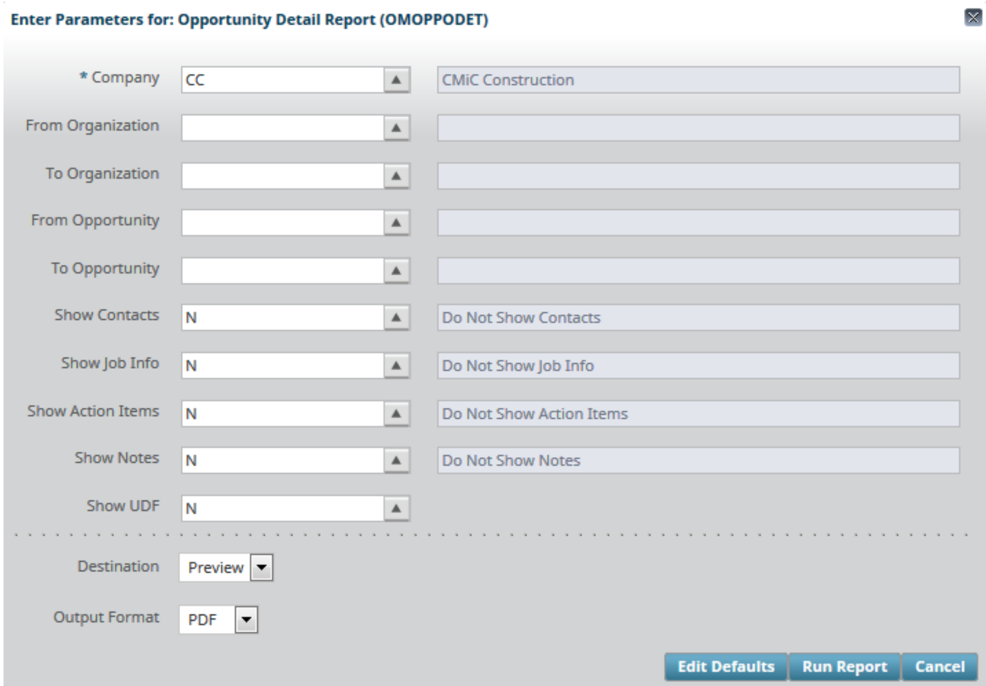
The following table provides details about the parameters used to generate this report:

Report Type	Select Report Type from list.
Consolidation	Select Consolidation Code from list.
Company	Company handling jobs associated to opportunities.
Fiscal Year	Year to include jobs.
Fiscal Period	Fiscal period in year to include jobs.

Opportunity Detail Report

The Opportunity Detail Report presents details about the opportunities being handled by the selected company.

Run Report



To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

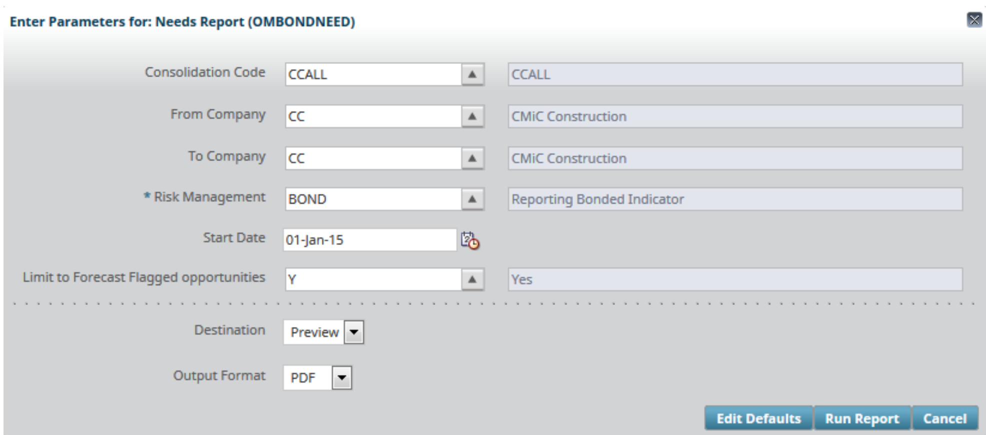
The following table provides details about the parameters used to generate this report:

Company	Company handling opportunities.
From Organization	Optional; if left blank, taken to be first organization, by code. Specifies which organization to start with, by Organization Code.
To Organization	Optional; if left blank, taken to be last organization, by code. Specifies which organization to end with, by Organization Code.
From Opportunity	Optional; if left blank, taken to be first opportunity, by code. Specifies which opportunity to start with, by Opportunity Code.
To Opportunity	Optional; if left blank, taken to be last opportunity, by code. Specifies which opportunity to end with, by Opportunity Code.
Show Contacts	Select whether or not to include information about the contacts associated with the opportunities.
Show Job Info	Select whether or not to include information about the jobs associated with the opportunities.
Show Action Items	Select whether or not to include the action items associated with the opportunities.
Show Notes	Select whether or not to include notes associated with the opportunities.
Show UDF	Select whether or not to include the User Defined Fields associated with the opportunities.

Needs Report

The Needs Report presents information about the selected Risk Management Code for opportunities handled by the selected companies.

Run Report



To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

The following table provides details about the parameters used to generate this report:

Consolidation Code	Select Consolidation Code from list.
From Company	Optional; if left blank, taken to be first company, by code. Specifies which company to start with, by Company Code.
To Company	Optional; if left blank, taken to be last company, by code. Specifies which company to end with, by Company Code.
Risk Management	Select Risk Management Code on which to report.
Start Date	Date to start including opportunities.
Limit to Forecast Flagged Opportunities	If you select “Yes”, only opportunities with the **Include In Forecast** flag set to true will be included in the report. On the Opportunities screen, this flag is found in the **Opportunity Management** section, which is the main section for the screen. If you select “No”, this flag is disregarded.

Surety Job Summary Report

The Surety Job Summary Report provides a list of Jobs with and without **BOND** applied. The Bonded indicator is flagged only if there is a Risk Management type of **BOND** (with or without a rate) applied to the Opportunity.

The Bonded field in the report will be marked **Y** to indicate a value of Yes.

This report also includes Jobs not related to Opportunities.

Run Report

***** identifies a Job where WIP has not been created.

p identifies a Job with WIP created, but not yet Posted.

To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

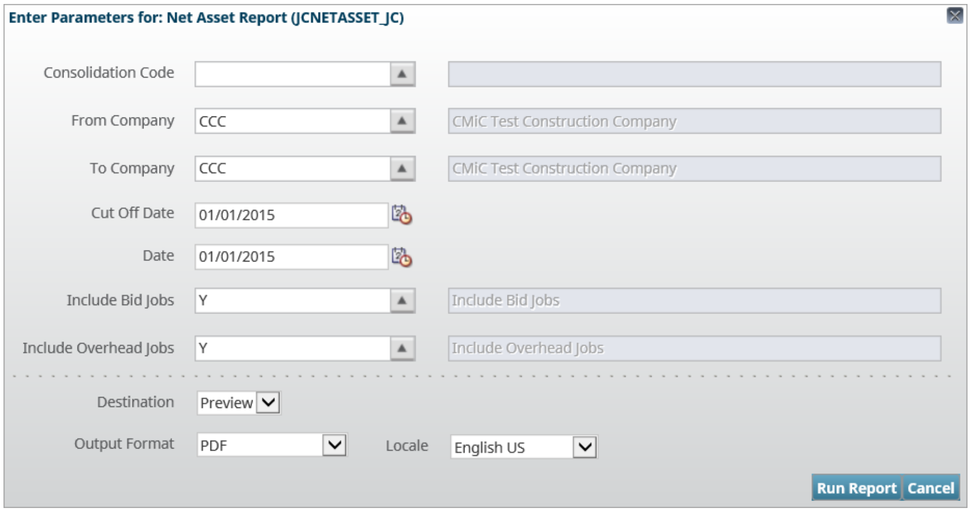
The following table provides details about the parameters used to generate this report:

Consolidation Code	Select Consolidation Code from list.
From Company	Optional; if left blank, taken to be first company, by code. Specifies which company to start with, by Company Code.
To Company	Optional; if left blank, taken to be last company, by code. Specifies which company to end with, by Company Code.
Year	Enter a year for the report data.
Period	Select a period for the report data.
Contract Type	Specifies contract types to include in report; by default, none are selected.

Net Asset Report

The Net Asset Report provides information on assets and liabilities for opportunities for the period of the report.

Run Report



To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

The following table provides details about the parameters used to generate this report:

Consolidation Code	Select Consolidation Code from list.
From Company	Optional; if left blank, taken to be first company, by code. Specifies which company to start with, by Company Code.
To Company	Optional; if left blank, taken to be last company, by code. Specifies which company to end with, by Company Code.
Cut Off Date	Limits what data is included in the 'AP Not Yet Paid' column by comparing the posting date of transactions with this Cut-Off Date.
Date	Date within period for which report is being run; posted transactions from vouchers, memos and checks are included up to this date.
Include Bid Jobs	Select to include Bid Jobs and display them in a separate section titled 'Bid Jobs'.
Include Overhead Jobs	Select to include Overhead Jobs and display them in a separate section titled 'Overhead'. This data includes any AP/AR data that is not Job-related.

Burn Off Report

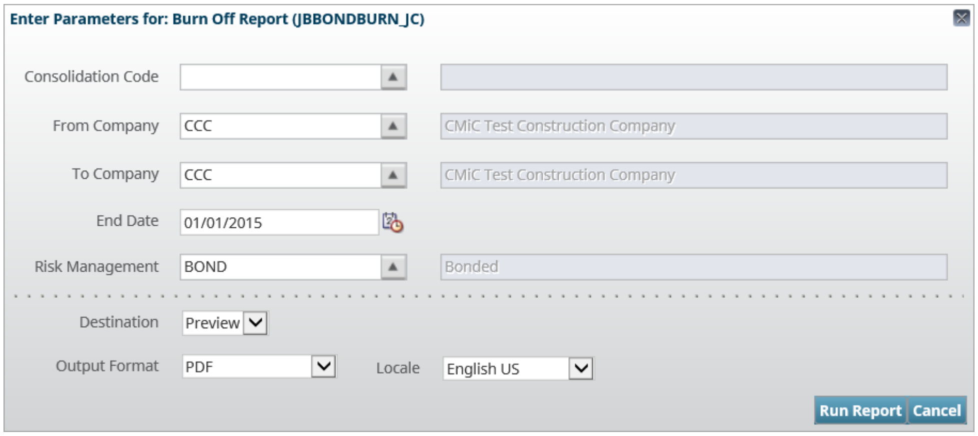
The Burn Off Report provides information on Jobs created in Opportunity Management where a specific Risk Management Code selected for the report has been assigned to the Opportunity.

Jobs will only be included where the Opportunity has the **Include in Forecast** flag set to true. On the Opportunities screen, this flag is found under its main section (**Opportunity Management**).

If there is no Work Location assigned, the Job will not be included in the report.

NOTE: This report relies on WIP having been Posted for the periods being reported. If no WIP data is found, the Job will not appear on the report.

Run Report



To run the report, select the desired report parameters through the Printing Options screen, as shown above, and click [**Run Report**].

The following table provides details about the parameters used to generate this report:

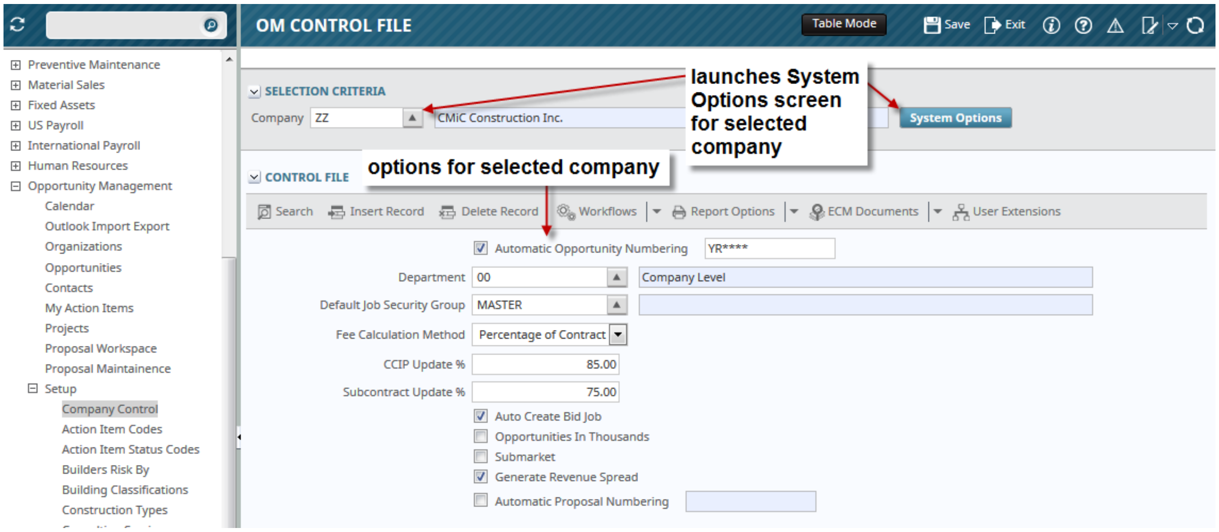
Consolidation Code	Select Consolidation Code from list.
From Company	Optional; if left blank, taken to be first company, by code. Specifies which company to start with, by Company Code.
To Company	Optional; if left blank, taken to be last company, by code. Specifies which company to end with, by Company Code.
End Date	Specifies end date for report.
Risk Management	Select Risk Management Code from list.

Set Up OM Module

Overview – Set Up OM Module

Before you start to roll out the Opportunity Management Module to your staff, you will need to have configured the system to meet your own unique corporate requirements. The set up procedure consists of predefining data for Prospect Types, Sales Stages, and Competitors… that match your business needs.

Company Control



Program: OMCTRL; Sample of Company Control screen (standard Treeview path: OM > Setup > Company Control)

The Company Control screen is used to set up the general options for the Opportunity Management module, for the company selected by the **Company** field (**Selection Criteria** section). For instance, whether or not the company uses auto numbering for opportunity codes, and the default Job Security for projects created for opportunities. Each company must have a Job Security Group assigned to it in order to complete the setup of the OM module for each company. Further options are available through the System Options screen, detailed by the *System Options* sub-section.

Configure OM Module for Company

Select the company for which to configure the OM module using the **Company** field, under the **Selection Criteria** section. Make any necessary changes, using the descriptions provided for each field in the following table. Click [**Save**] to save the company's configuration to a record.

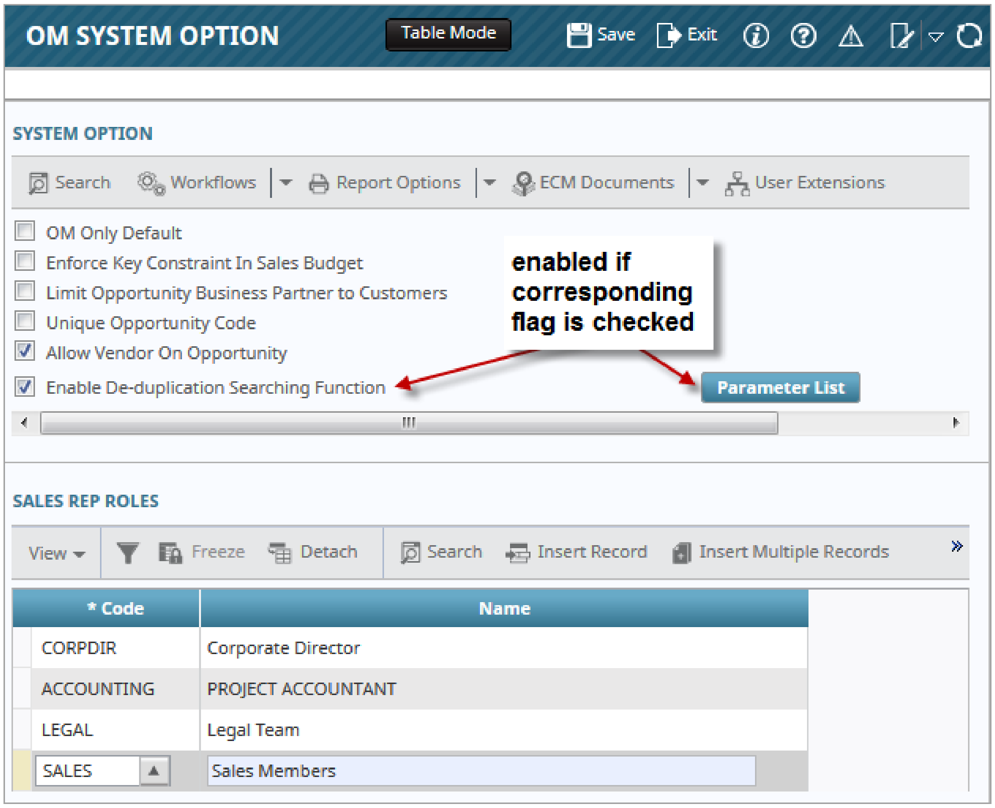
The following table provides descriptions for the fields under the **Control File** section:

Automatic Opportunity Numbering	Automatically create the code for a new opportunity record, as specified. E.g. "YR****" specifies that new codes begin with "YR" and the next available 4-digit number.
Department	Default department for newly created opportunities.
Default Job Security Group	Select the appropriate Job Security Group to be applied to the selected company. This is a full list of all Job Security Groups associated with the selected company.
Fee Calculation Method	This option determines how the **Fee Amt** (Field Amount) field of an opportunity is calculated, as a percentage of the Potential Revenue field. The following are the formulas for the two Fee Calculation Methods: 1. **Percentage of Contract**: **Fee Amt** = **Potential Revenue** x **Fee %** 2. **Percentage of Cost**: **Fee Amt** = (**Potential Revenue x Fee %) / (1 + Fee %)**
CCIP Update %	This percentage is used to automatically calculate the **CCIP Volume** field on the **Risk Management** tab of an opportunity, based on the following formula: **CCIP Volume = Potential Revenue** (on General tab) **x CCIP Update %**

Subcontract Update %	This percentage is used to automatically populate the **Subcontract Volume** field on the **Risk Management** tab of an opportunity, based on the following formula: **Subcontract Volume** = **Potential Revenue** (General tab) **x Subcontract Update %**
Auto Create Bid Job	When checked, flag tells system to automatically generate a Bid Job when an opportunity is created. Note, the Project Management module also has a flag that controls whether or not a Bid Job is automatically created when a project is created. **NOTE**: If 'Auto Create Bid Job' is checked and a 'Default Job Security Group' has also been selected on the OM Control screen for a specified company, all bid jobs created from the OM in the specified company will be assigned to this security group by default. Ensure the user is assigned to the specified Job Security Group in the System module (standard Treeview path: *System > Security > Job/Project Security > Assign Users to Security Groups*), otherwise the system will generate an error message when user attempts to create a new opportunity.
Opportunities in Thousands	This flag is used to identify if amounts entered for opportunities are done so with the three zeros that represent thousands or without them. (E.g. Enter 7500 instead of 7500000, to represent an opportunity with revenues projected at $7,500,000.00).
Submarket	This flag indicates if Sales Plans are to be at the sub-market level or not for the company. Basically, it controls whether or not submarket sectors are used. When this flag is activated, the **Ctrl Market Sector** field is enabled in the Opportunities screen; otherwise, only the **Market Sector** field is enabled and the **Ctrl Market Sector** field becomes irrelevant, and set to "**ALL**" by the system.
Generate Revenue Spread	When checked, any changes to an opportunity's **Potential Revenue** or **Gross Profit** amounts will trigger an automatic regeneration of the data on an opportunity's **Revenue** tab.
Automatic Proposal Numbering	Automatically create the code for a new Proposal record, as specified. E.g. "PR****" specifies that new codes begin with "PR" and the next available 4-digit number.

System Options

To launch the System Options screen for the company selected in the **Company** field, as shown in the previous screenshot, click the **[Systems Options]** button. Below is a sample of the System Options screen:



The following are details about the flags on this screen, and details about the table that maintains the available values for the company's **Sales Rep Roles**.

OM Only Default

This flag is used to determine if an Organization record is available in the Business Partners screens of CM*i*C Enterprise, or if it is only available within the OM module.

Enforce Key Constraint in Sales Budget

This flag allows the user to create duplicate Sales Budget records (based on company, department, market sector and year), thereby allowing the user to include user-defined fields in their "key" (which will not be enforced if the flag is un-checked). The result is that there will be multiple records with the same company, department, market sector and year.

Limit Opportunity Business Partner to Customers

This flag is used to limit the types of business partners that are available in Organization/Business Partner drop-down lists (List of values) on the Opportunity screen. When this check-box is checked, the business partner LOV will display only valid customers of the Company named in the opportunity.

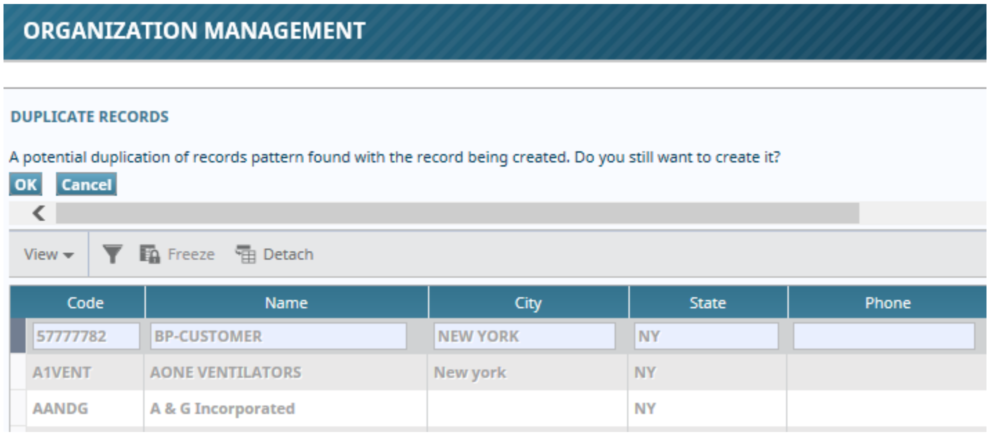
Unique Opportunity Code

When this flag is checked, only unique opportunities can be created system-wide, i.e., the same opportunity code cannot be created in multiple companies. In addition, the system requires that any code being used to create the opportunity/project/job should not already exist in the system.

Allow Vendor on Opportunity

This flag is used to limit the types of business partners that are available in Organization/Business Partner drop-down lists (List of values) on the Opportunity screen. When this check-box is checked, a business partner that was set up as a vendor in the system will be available in these lists, on the Opportunity screen.

Enable De-duplication Searching Function



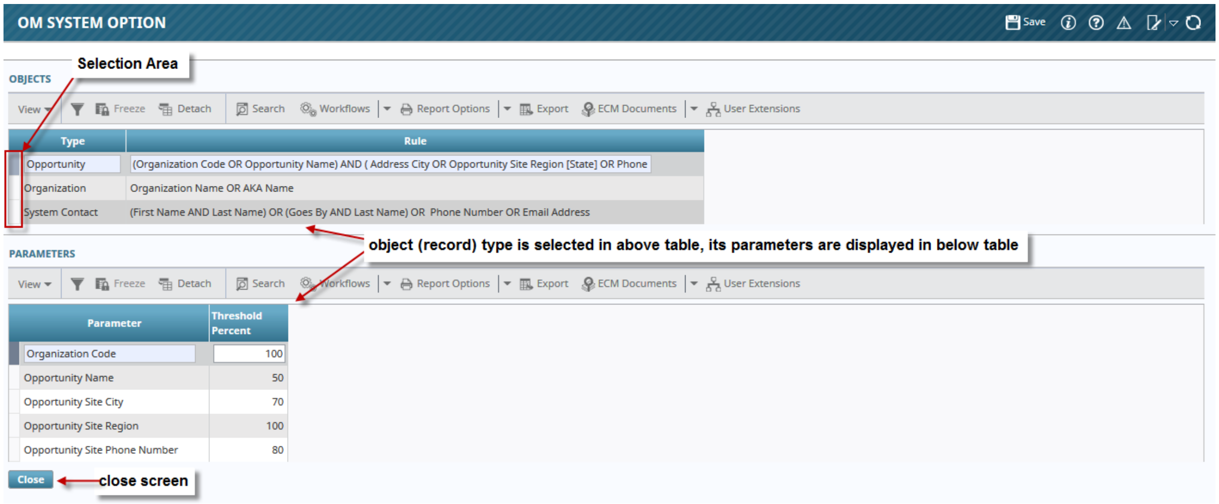
Sample of a Duplicate Records notification.

When this flag is checked, a backend process is run when saving a new Organization, Opportunity or Contact record to ensure that the new record is not a duplication of an existing record. Duplications happen simply because users enter slight variations of fields when creating records. As shown above, if matching records are found, the system presents them to you and asks if you would like to proceed with creating the record. You can use this screen to verify if the new record is indeed a duplicate.

Also, when this flag is checked, the corresponding [**Parameter List**] button will be enabled, as shown in the previous screenshot. The rules and settings for how records are matched for duplicates are found on the screen launched by this button, as detailed in the following sub-section.

NOTE: When the **Enable De-duplication Searching Function** flag is checked, new entries of Organization, Opportunity, and Contact records can only be made when the screens to enter them are in Form Mode. This is necessary to prevent more than one record being saved at the same time, which cannot be handled by the De-duplication Searching function.

De-Duplication Searching Function – [Parameter List] Button



*Screen launched by the [**Parameter List**] button to set threshold for matching parameters.*

The De-Duplication Parameter screen, shown above, launched by the [**Parameter** List] button is used to configure the backend De-Duplication process that checks to ensure that new **Opportunity**, **Organization**, and **System Contact** records are not duplicates of existing records. The configuration only requires setting the matching thresholds (**Threshold Percent** column in lower section) for the fields used by a record type's matching rule (**Rule** column in upper section).

In the **OBJECTS** screen section, the **Type** column list the three record types, and the **Rule** column shows each type's matching rule for identifying duplicates.

For the record type selected in the **OBJECTS** section, the **Threshold Percent** column in the **PARAMETERS** section displays the matching threshold for each key field in the record type's matching rule. The matching thresholds are used to set how closely the key fields must match between records for the records to be considered duplicates.

The following provides details about the matching rules in the **Rule** column of the upper section, and matching thresholds in the **Threshold Percent** column of the lower section:

Rule - Column

A matching rule is a logical expression that specifies how fields between records are matched to find duplicates. Each record type has a matching rule, and each matching rule contains key fields that are relevant to finding duplicates of that record type.

Example:

Type	Rule
Opportunity	(Organization Code OR Opportunity Name) AND (Address City OR Opportunity Site Region [State] OR Phone Numbe

For the **Opportunity** record type shown above, two records are considered a match if:

At least one of the following key fields match: **Organization Code** <u>OR</u> **Opportunity Name**; <u>AND</u> at least one of these following key fields match: **Address City** <u>OR</u> **Opportunity Site Region's State** <u>OR</u> **Phone #**.

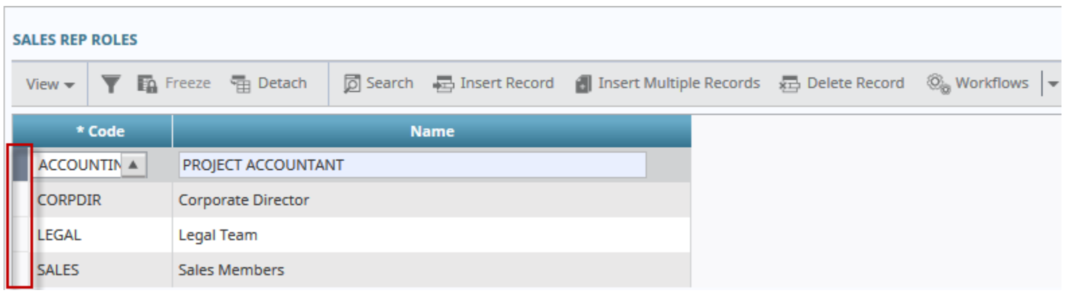
How closely the fields must match is determined by the **Threshold Percent** values under the **PARAMETERS** section of the screen.

Threshold Percent - Column

Sets how similar a record type's field between two records must be for the fields to be considered a match, on a character-by-character basis; e.g., 100% means the fields must be a perfect match, and 50% means the fields must be at least a 50% match.

NOTE: Fields can be entered quite differently by different users. With a lower threshold, more potential matches will be made, increasing the odds that a duplication is found; however, more records will be matched and require examination.

Sales Rep Roles Maintenance



Sales Rep Roles section of OM System Option screen.

The table shown above is used to maintain the list of Sales Representative Roles available throughout the OM module, for the company selected in the **Company** field, on the Company Control screen.

Add Sales Rep Role

To add a new role type, click the [**Insert Record**] button to create a new row for entry.

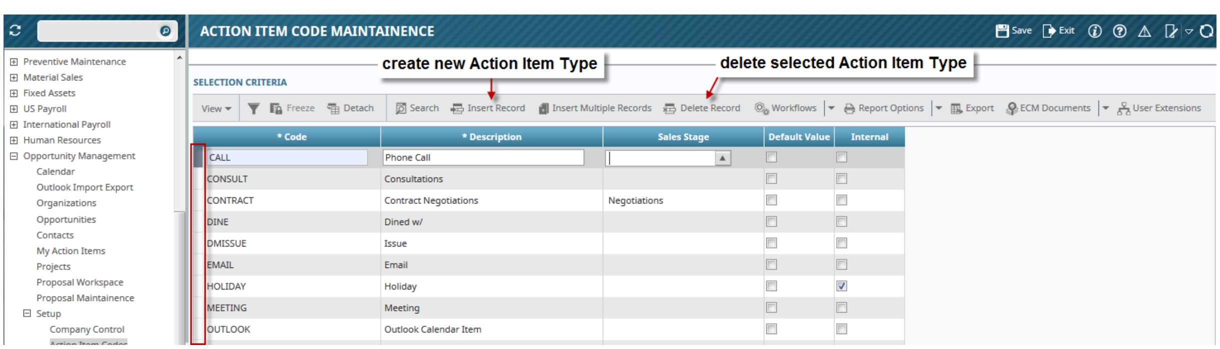
Selecting existing role from the Project Management Roles table (maintenance screen's standard Treeview path: **Job Costing** > **Setup** > **Local Tables** > **Project Management Roles**).

Click [**Save**] when finished.

Delete Sales Rep Role

To delete a record, select its row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Action Item Codes



Action Item Code Maintenance screen.

As mentioned in the *My Action Items* section of this reference guide, action items are used to schedule and coordinate phone calls, delivery dates, meetings and other action types relevant to the OM module. This screen is used to maintain the Action Item Types available from the drop-down list field used to identify the action item's type.

The following table provides descriptions for the fields of an Action Item Type entry:

Code	Code to identify the action item type.
Description	Description of the action item type.
Sales Stage	Optional; Sales Stage associated to action item type. Maintenance screen's standard Treeview path: **Opportunity Management > Setup > Sales Stages**; refer to the *Sales Stages sub*section under *Set Up OM Module* for details about setting up Sales Stages.
Default Value	Indicates that the corresponding action item type is the default type for new action items. **NOTE**: Only one type can be selected as the default for new action items.
Internal	Indicates that the type is only available in the OM module.

Create New Action Item Type

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new type. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new type.

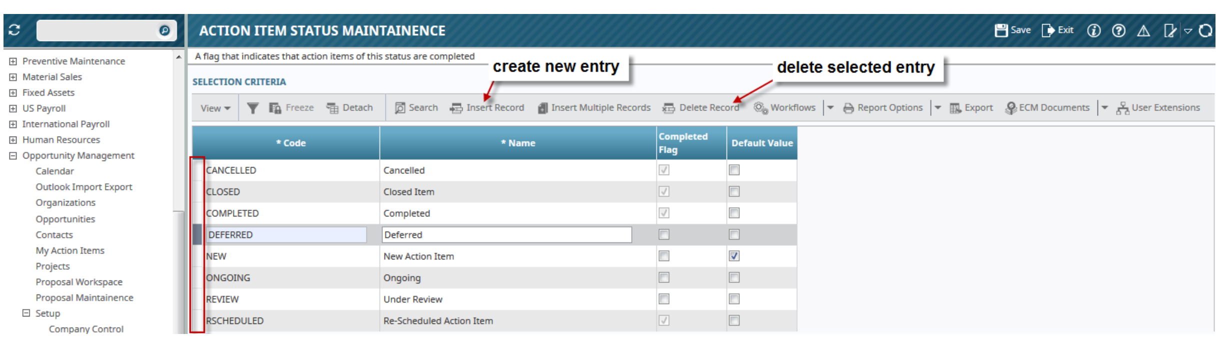
Edit Action Item Type

Make any necessary edits to a type and click [**Save**] to save them.

Delete Action Item Type

Select the type's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Action Item Status Codes



Action Item Status Code Maintenance screen.

As mentioned in the *My Action Items* section of this reference guide, action items are used to schedule and coordinate phone calls, delivery dates, meetings and other action types relevant to the OM module. This screen is used to maintain the Action Item Statuses available from the drop-down list field used to identify the current status of an action item.

The following table provides descriptions for the fields of an Action Item Status entry:

Code	Code to identify the action item status.
Description	Description of the action item status.
Completed Flag	Indicates action item of this status was completed.
Default Value	Indicates that the corresponding action item status is the default status for new action items. **NOTE**: Only one status can be selected as the default for new action items.

Create New Action Item Status

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new status. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new type.

Edit Action Item Status

Make any necessary edits to a status and click [**Save**] to save them.

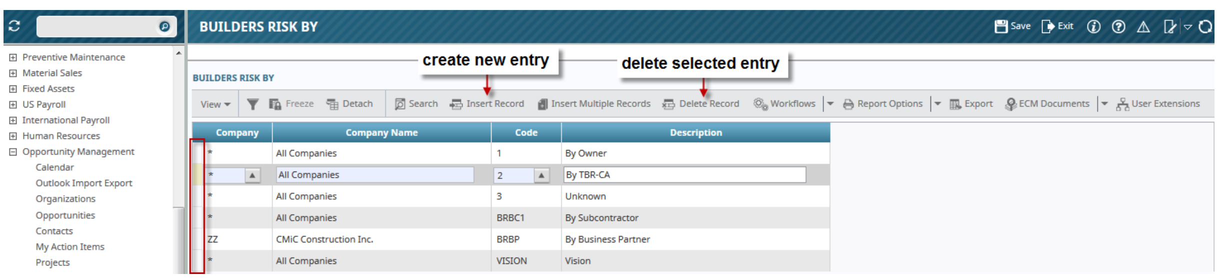
NOTE: If a Status is system defined, edits are not permitted.

Delete Action Item Status

Select the type's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

NOTE: If the Status Code is system defined, it cannot be deleted.

Builders Risk By



Builders Risk By Maintenance screen.

This screen is used to maintain the Builders Risk By options available from the **Builders Risk By** drop-down list field for an opportunity. This field is found the **More Info** tab of an opportunity.

The following table provides descriptions for the fields of a Builders Risk By entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".

Code	Code to identify the Builders Risk By option.
Description	Description of the Builders Risk By option.

Create New Builders Risk By Option

Click the Block Toolbar’s [**Insert Record**] button to create a new row for entering information for the new option. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new option.

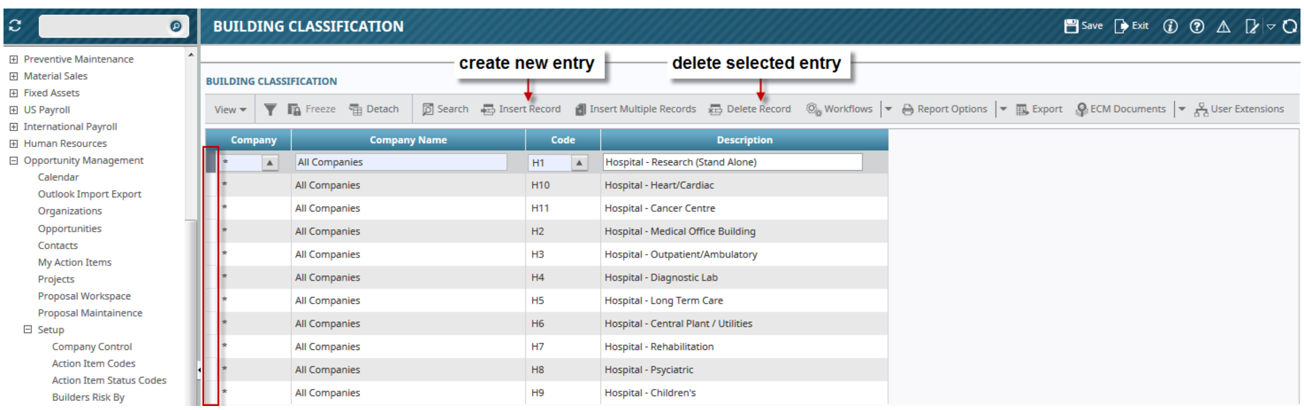
Edit Builders Risk By Option

Make any necessary edits to an option and click [**Save**] to save them.

Delete Builders Risk By Option

Select the option’s row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Building Classifications



Building Classifications Maintenance screen.

This screen is used to maintain the Building Classification options available from the **Building Classifications** drop-down list field for an opportunity. This field is found in the **General** tab of an opportunity.

The following table provides descriptions for the fields of a Building Classification entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays “All Companies”.
Code	Code to identify the Building Classification option. You can enter text over this field instead of choosing a value from the list.
Description	Description of the Building Classification option.

Create New Building Classification

Click the Block Toolbar’s [**Insert Record**] button to create a new row for entering information for the new option. Use the above table if you require descriptions for the fields.

NOTE: You can enter text over the **Code** field instead of choosing a value from the list.

Click [**Save**] to save the new option.

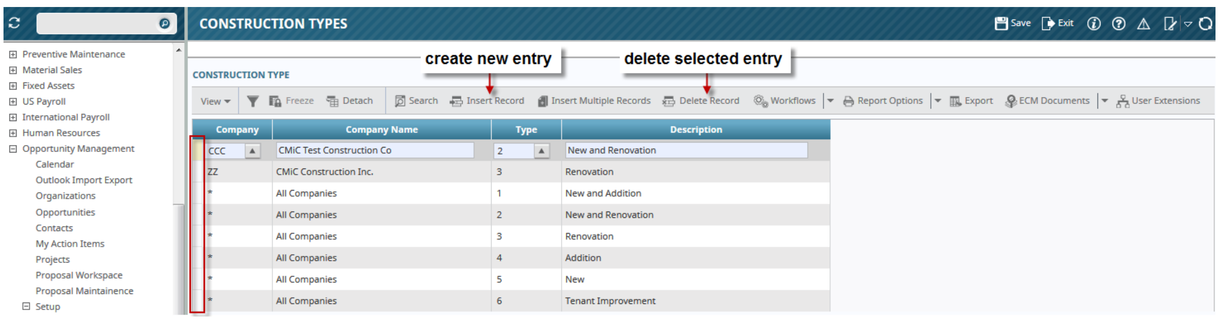
Edit Building Classification

Make any necessary edits to an option and click [**Save**] to save them.

Delete Building Classification

Select the Building Classification’s row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Construction Types



Construction Types Maintenance screen.

This screen is used to maintain the Construction Types available from the **Construction Types** drop-down list field for an opportunity. This field is found on the **General** tab of an opportunity.

The following table provides descriptions for the fields of a Construction Type entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays “All Companies”.
Type	Code to identify the Construction Type. You can enter text over this field instead of choosing a value from the list.
Description	Description of the Building Classification option.

Create New Construction Type

Click the Block Toolbar’s [**Insert Record**] button to create a new row for entering information for the new option. Use the above table if you require descriptions for the fields.

NOTE: You can enter text over the **Type** field instead of choosing a value from the list.

Click [**Save**] to save the new option.

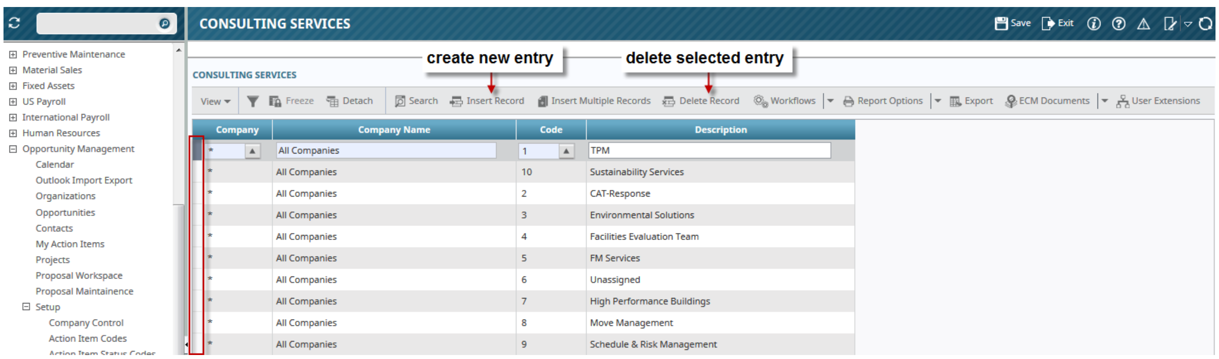
Edit Construction Type

Make any necessary edits to an option and click [**Save**] to save them.

Delete Construction Type

Select the Construction Type's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Consulting Services



Consulting Services Maintenance screen.

This screen is used to maintain the Consulting Services available under the **Potential Internal Consulting Services** section of an opportunity's **Details** tab.

The following table provides descriptions for the fields of a Consulting Services entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Code	Code to identify the Consulting Service option. You can enter text over this field instead of choosing a value from the list.
Description	Description of the Consulting Service option.

Create New Consulting Service Option

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new option. Use the above table if you require descriptions for the fields.

NOTE: You can enter text over the **Code** field instead of choosing a value from the list.

Click [**Save**] to save the new option.

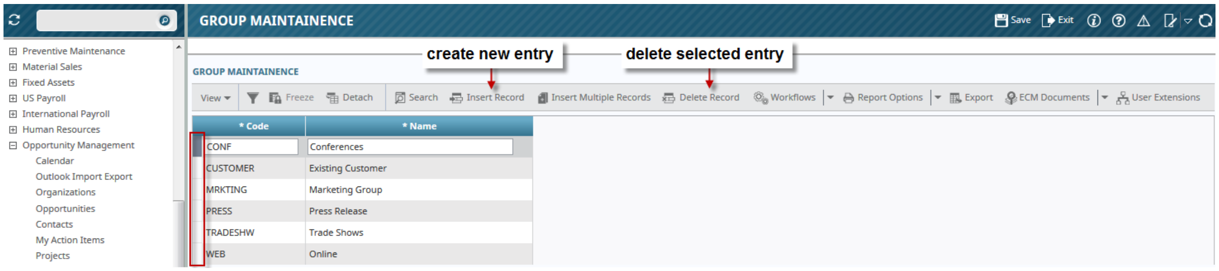
Edit Consulting Service Option

Make any necessary edits to an option and click [**Save**] to save them.

Delete Consulting Service

Select the Consulting Service's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Groups



Groups Maintenance screen.

A **Source** indicates the source of an opportunity, and it can belong to a **Group**. This screen is used to maintain the Groups available for the Source options maintained by the Sources screen (**Opportunity Management >** **Setup** > **Sources**). The Source options maintained by the Sources screen have a **Group** field, and the options available from this field are maintained through this screen.

Groups are used for reporting, allowing you to combine multiple sources. For example, you may have multiple trade shows per year, and want to create a group for 2015 Trade Shows and one for 2016 Trade Shows, so that you could create a report to measure trade show performance per year. Group codes are not mandatory.

The following table provides descriptions for the fields of a Consulting Services entry:

Code	Code to identify the Sources Group.
Name	Name for the Sources Group.

Create New Group

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new Sources Group. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new option.

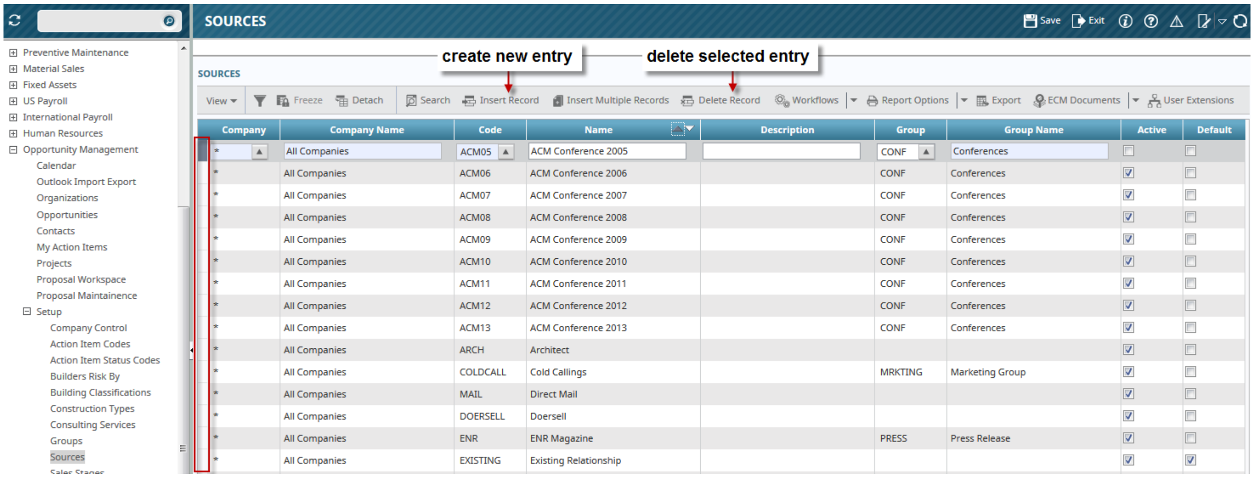
Edit Group

Make any necessary edits to a group and click [**Save**] to save them.

Delete Group

Select the group's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Sources



Source Maintenance screen.

This screen is used to maintain the options available for **Source** drop-down list, which is available on an opportunity's **General** tab. Sources are used to track where/how the prospect learnt about your company, or where you as a sales person found out about the prospect. This information can then be used to help determine your most effective marketing strategies.

The following table provides descriptions for the fields of a Source entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Code	Code to identify the Source option.
Name	Name for the Source option.
Description	Description of the Source option.
Group	Optional; Group for which the Source belongs. See previous section. Maintenance screen: **Opportunity Management** > **Setup** > **Groups**.
Group Name	Name of Source Group, selected by **Group** field.
Active	Indicates if corresponding Source entry is active. This flag is used to ensure that the list of available source codes does not get too large, and to stop users from accidentally selecting unused codes
Default	Indicates that the corresponding Source entry is the default value for a **Source** field.

Create New Source

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new source. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

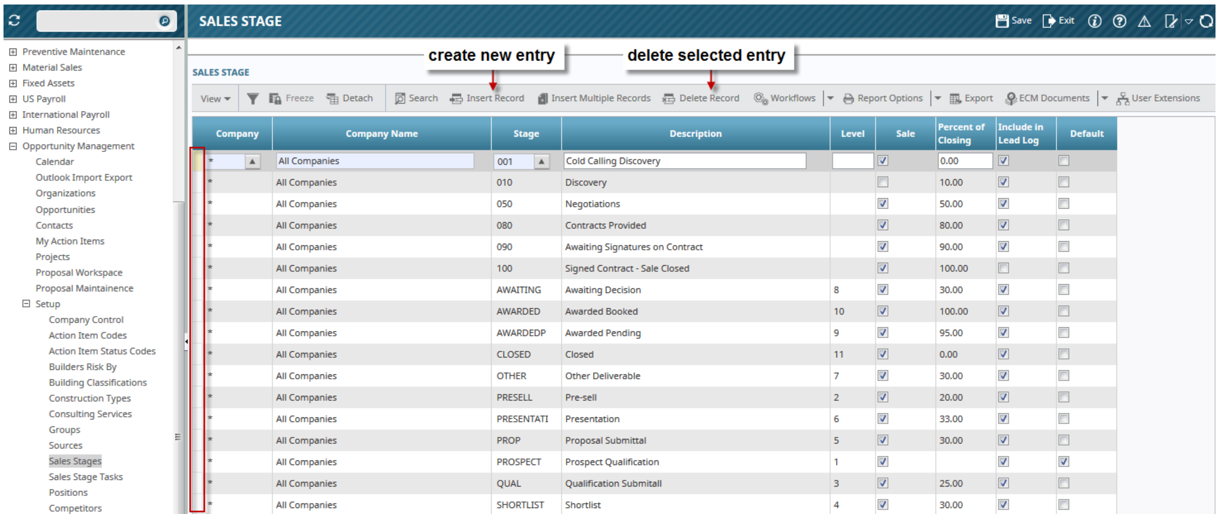
Edit Source

Make any necessary edits to a Source entry and click [**Save**] to save them.

Delete Source

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Sales Stages



Sales Stages Maintenance screen; standard Treeview path: ***Opportunity Management > Setup > Sales Stages***

This screen is used to maintain the Sales Stage options available for Sales Stage drop-down list. A Sales Stage field identifies the Sales Stage for an opportunity, as set on an opportunity's **General** tab. Defining Sales Stages breaks the sales process into levels/phases, and defines the activities/steps within each level. For example, your first level may be 'Qualifying', and during this level your actions might be: a) Complete Initial Contact b) Confirm Interest, c) Evaluate Product Fit, and d) Evaluate Timeline.

Having a structured Sales Stage setup allows for you to track, communicate and report all phases of the sales cycle, at any time, using standard reports that everyone will understand. Also, keep the following points about Sales Stages in mind:

- Sales Stages are applied to Opportunities.
- Sales stages can also be applied against competitors on an opportunity.
- Sales stages can later be applied to 'Action Items'.

The following table provides descriptions for the fields of a Sales Stage entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Stage	Code to identify the Sales Stage entry. You can enter text over this field instead of choosing a value from the list.
Description	Description of the Sales Stage.
Level	Indicates the level of this stage, within the sales process.
Sale	If this stage does not correspond to a sale, uncheck this flag.

Percent of Closing	Indicates the chance of closing the sale, at this stage.
Include in Lead Log	Indicates if this stage is to be included in the Lead Log Report.
Default	Indicates that the corresponding stage is the default value for a **Sales Stage** field.

Create New Sales Stage

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new entry. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

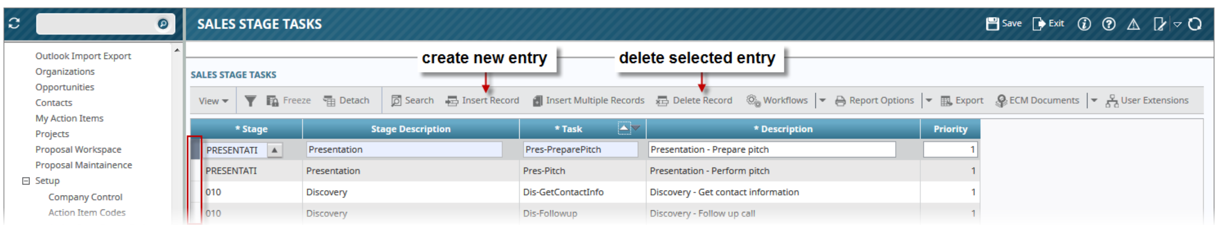
Edit Sales Stage

Make any necessary edits to a Sales Stage entry and click [**Save**] to save them.

Delete Sales Stage

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Sales Stage Tasks



Sales Stage Tasks Maintenance screen.

This screen is used to maintain the values available for Sales Stage Task fields, which are associated to Sales Stages.

The following table provides descriptions for the fields of a Sales Stage entry:

Stage	Sales Stage associated with the Sales Stage Task.
Description	Description of the Sales Stage.
Task	Code to identify the Sales Stage Task, which is associated to the Sales Stage selected by the Stage field (maintenance screen: **Opportunity Management** > **Setup** > **Sales Stages**).
Description	Description of the Sales Stage Task.
Priority	Priority of the Sales Stage Task.

Create New Sales Stage Task

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new Sales Stage Task. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

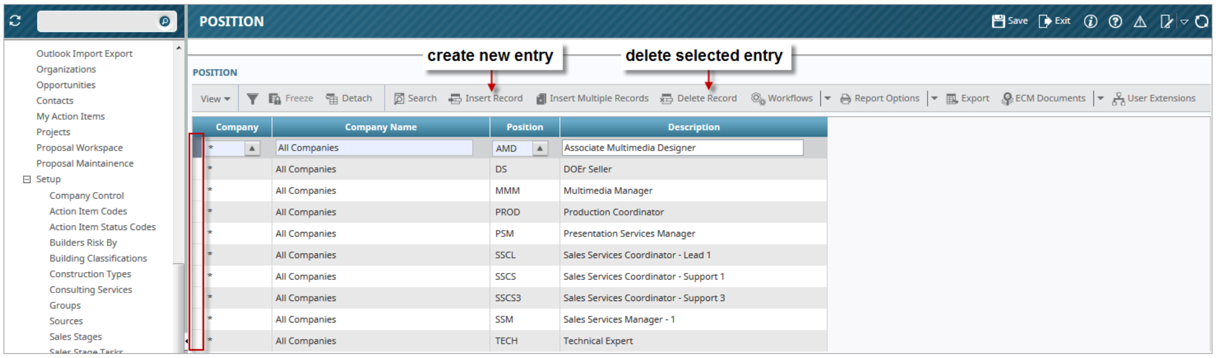
Edit Sales Stage Task

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Sales Stage Task

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Positions



Positions Maintenance screen.

This screen is used to maintain the roles (positions) available for the drop-down list used to specify the role (position) of a member that belongs to a Sales Support Team. Sales Support Teams are created manually for each opportunity. Members of an opportunity's Sales Support Team, along with their particular role (position), are specified under the **Sales Support Team** section of an opportunity's **Team** tab. Also, the Sales Support Team does not have to be comprised of employees from only your own company; you may have members from consulting companies or strategic alliance partners.

The following table provides descriptions for the fields of a Positions entry:

Company	Company for which the entry is available. An asterisk (*****) indicates that it is available for all companies.
Company Name	Name of company selected by Company field. If asterisk is selected, field displays **All Companies**.
Position	Position (role) within Sales Support Team.
Description	Description of the position.

Create New Position

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new entry. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

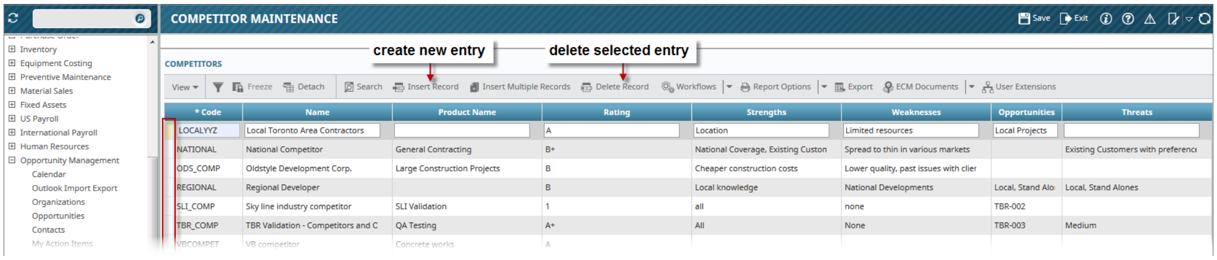
Edit Position

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Position

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Competitors



Competitors Maintenance screen.

The Competitors Maintenance screen is used to maintain the list of competitors used by fields that specify competitors, such as the **Competitor** field on an opportunity's **Competitors** tab. Also, it lets you keep on file, and easily available for each opportunity, your competitors' strengths and weaknesses. This allows your sales team to be aware of the sales environment and take advantage where you have the competitive edge. Also:

- You can track the strengths and weaknesses of your competitors for multiple products lines
- Competitors can be applied to opportunities, plus you can track the known sales stage of each competitor on the opportunity, as well as your own sales stage

The following table provides descriptions for the fields of a Competitor entry:

Code	Code to identify this Competitor record.
Name	Competitor's name.
Product Name *(Service)*	Competitor's product or service.
Rating	Competitor's rating (score).
Strengths	Competitor's strengths.
Weaknesses	Competitor's weaknesses.
Opportunities	Opportunities for which competitor is competing.
Threats	Any threats posed by the competitor.

Create New Entry

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new competitor. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

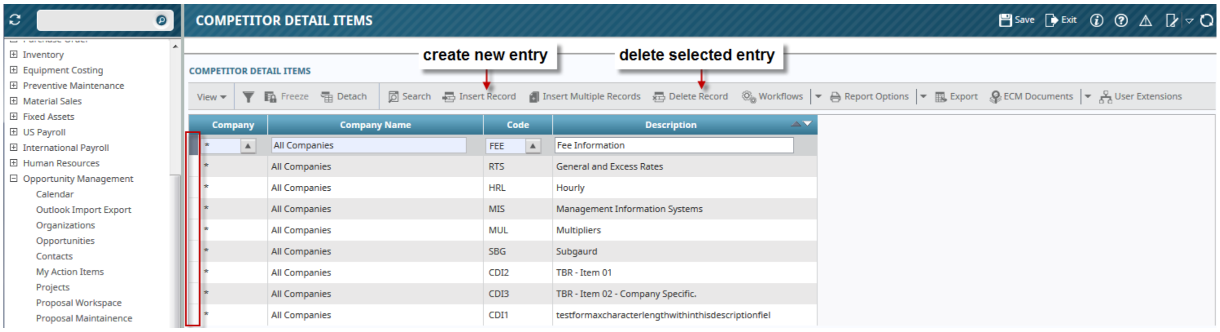
Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Competitor Detail Items



Competitor Detail Items Maintenance screen.

This screen is used to maintain the list of Competitor Detail Items, which are types of fees charged by competitors. Each particular fee would be a Competitor Detail Item.

The entries maintained by this screen are used by the **Item** field that is under the **Competitor Detail** section of an opportunity's **Competitors** tab.

The following table provides descriptions for the fields of a Competitor Detail Item entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Code	Code to identify the Competitor Detail Item.
Description	Description of the Competitor Detail Item.

Create New Entry

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new entry. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

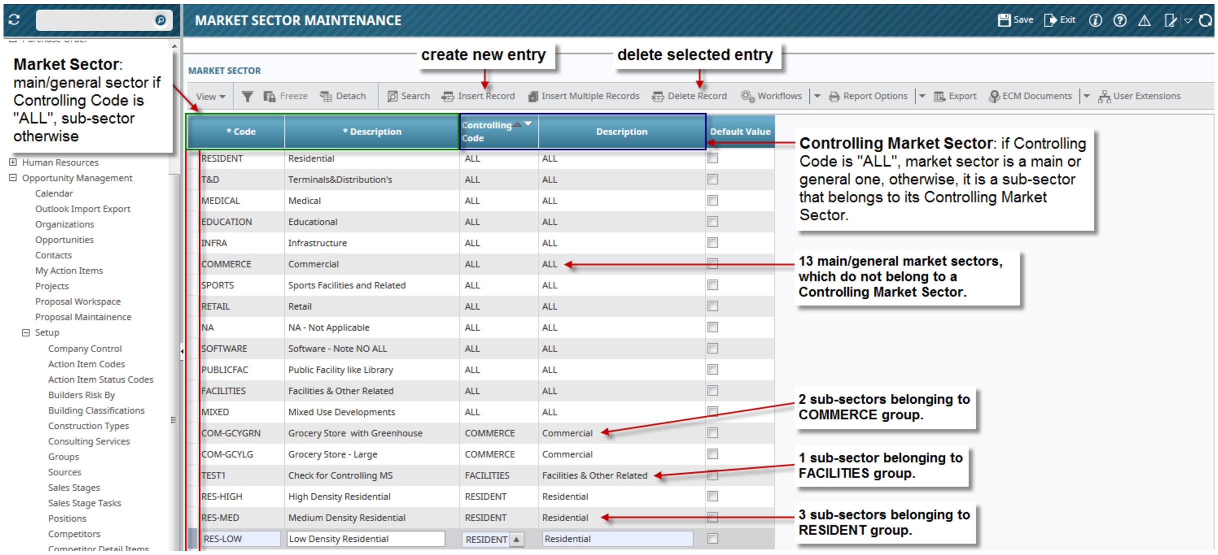
Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Opportunity Market Sector



Market Sector Maintenance screen.

Market sectors and submarket sectors are defined for identification of the different types of projects that are being examined. Examples might include: Institutional, Educational, Medical, and Commercial. Other than tracking the market sector(s) to which opportunities belong, for various reasons, market sectors are used to group opportunities for some reports, such as the Sales Forecast Report and Lead Log Report.

NOTE: As the Market Sector field is mandatory when detailing an Opportunity, if it is not being utilized, then a NA–Not Applicable type should be assigned.

This screen allows the entry of two types of market sectors: general market sectors, and submarket sectors. A general market sector is referred to as a Controlling Market Sector. The other type is referred to as a Submarket Sector, which belongs to a Controlling Market Sector. To distinguish between the two types, if a market sector is a general market sector, its **Controlling Code** is set to "**ALL**". If a market sector is a submarket sector, its **Controlling Code** is set to the code of its Controlling Market Sector, indicating that it is a submarket sector of the specified general market sector.

Submarket Flag – Set Whether Submarket Sectors are Used

Whether or not submarket sectors are used is set by the **Submarket** flag on the OM Control File screen (see the *Configure OM Module for Company* section, under *Set Up OM Module*, in this reference guide for details). If checked, the **Ctrl Market Sector** and **Market Sector** fields are both used, with the **Market Sector** field being the submarket sector; otherwise, the **Ctrl Market Sector** field is irrelevant and set to "**ALL**", and just the **Market Sector** field is used to select a market sector.

The following table provides descriptions for the fields of a Market Sector entry:

Code	Code to identify market sector. If **Controlling Code** is "ALL", it is a general/main market sector (Controlling Market Sector); otherwise, it is a market sub-sector.
Description	Description of market sector.
Controlling Code	Choose "ALL" if market sector is a Controlling Market Sector, or choose the code of the Controlling Market Sector that it belongs to if it is a market sub-sector.

Description	If market sector (specified by **Code** field) is a sub-sector, this field is a description of the sub-sector's Controlling Market Sector; if market sector is a general/main one, this field is set to "ALL".
Default Value	Check to indicate that market sector fields are to default to this market sector. **NOTE**: Only one market sector can be flagged as the default.

Create New Market Sector

Use the above table if you require descriptions for the fields, and keep in main that there are two types of market sectors. One type being a general or main market sector (Controlling Market Sector), the other being a sub-sector of a main sector.

Create New Controlling Market Sector

Click the Block Toolbar's [**Insert Record**] button to create a new row. Enter the code for the Controlling Market Sector in the **Code** field and its description in the **Description** field. For the **Controlling Code** field, select "ALL" to indicate that this market sector is a Controlling Market Sector. Click [**Save**]. Now this new Controlling Market Sector has been added to the list of Controlling Market Sectors (available in drop-down list for **Controlling Code** field)

Create New Market Sub-Sector

Note, you cannot create a new sub-sector that is a member of a new Controlling Market Sector at the same time. The new Controlling Market Sector must first be created, using the above instructions, and then the new sub-sector can be created (previously created Controlling Market Sector can then be selected through the **Controlling Code** field).

To create a new sub-sector, which has its Controlling Market Sector already created, click [**Insert Record**] to create a new row. Enter the code for the sub-sector in the **Code** field and its description in the **Description** field. For the **Controlling Code** field, select the Controlling Market Sector to which it belongs. Click [**Save**].

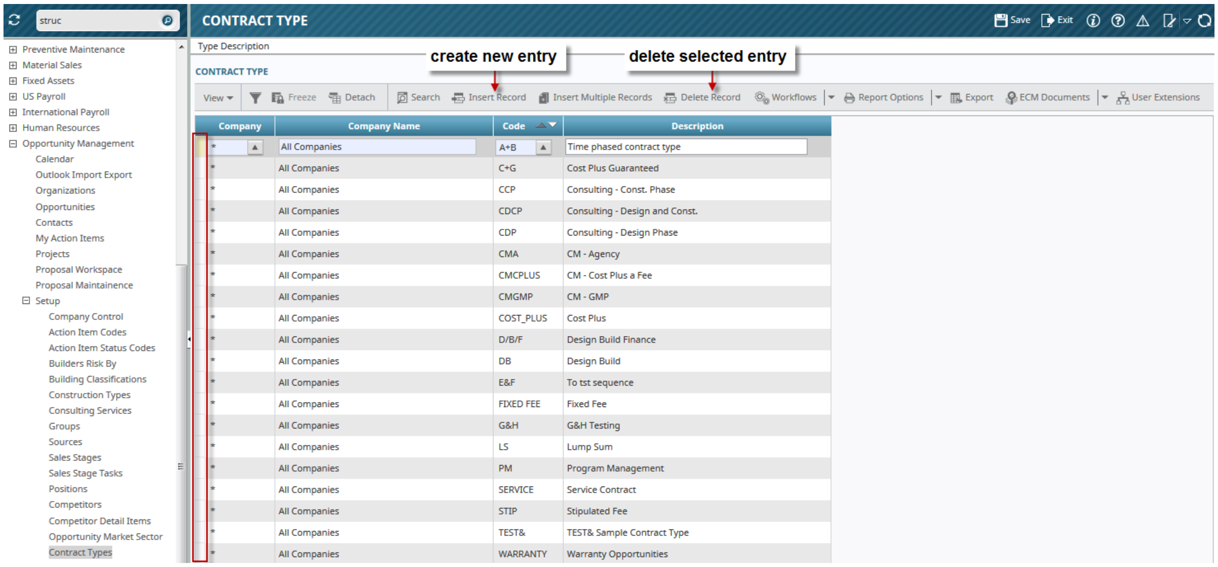
Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Contract Types



Contract Type Maintenance screen.

This screen is used to maintain the list of Contract Types, which is used to populate lists for fields that specify a Contract Type, such as the **Delivery Method** field on the **General** tab of an opportunity.

The following table provides descriptions for the fields of a Contract Type entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays “All Companies”.
Code	Code to identify Contract Type.
Description	Description of Contract Type.

Create New Contract type

Click the Block Toolbar’s [**Insert Record**] button to create a new row for entering information for the new Contract Type. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

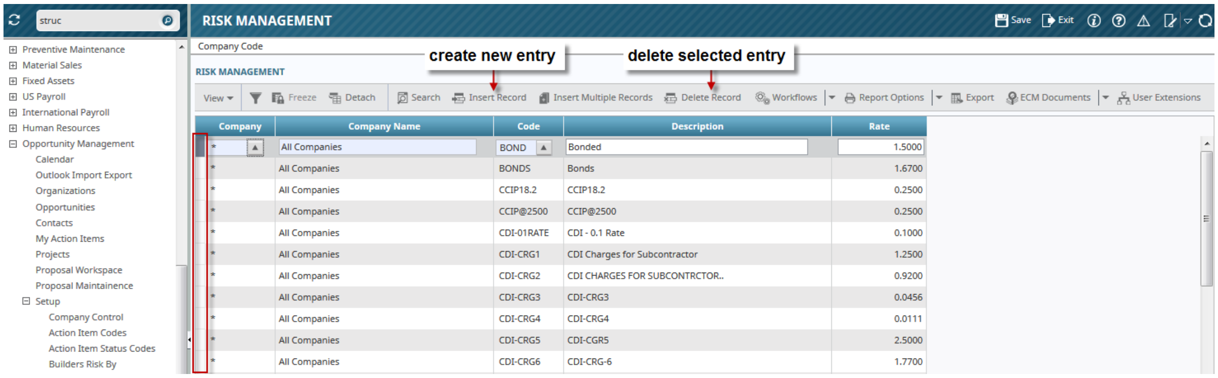
Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry’s row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Risk Management



Risk Management Maintenance screen.

This screen is used to maintain the list of Risk Management Items, such as a particular insurance to cover the costs of a particular impact. This list of items is used to populate the table under the **Risk Management** section of an opportunity's **Risk Management** tab.

The following table provides descriptions for the fields of a Risk Management entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Code	Code to identify Risk Management Item.
Description	Description of Risk Management Item.
Rate	Optional; If relevant, enter the rate for the Risk Management Item.

Create New Risk Management Item

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new Risk Management Item. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

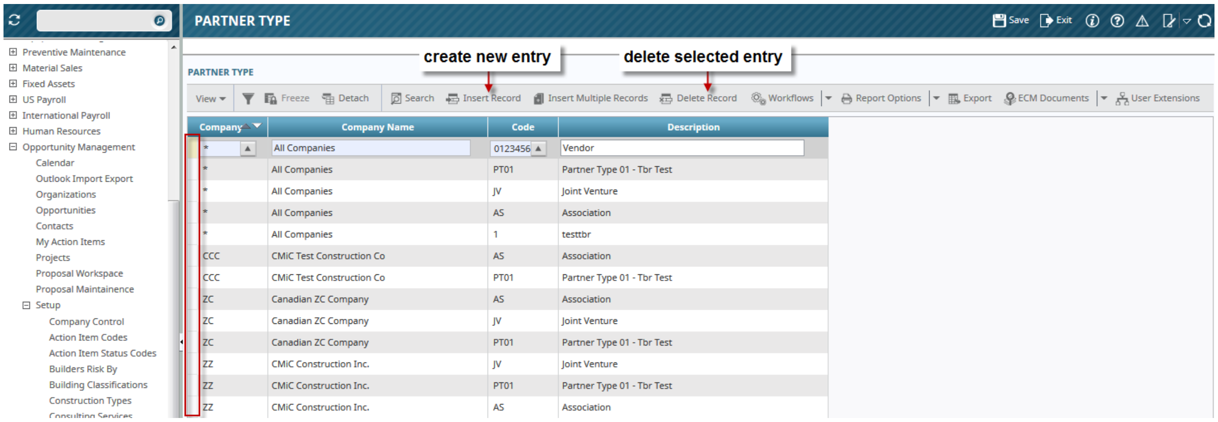
Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Partner Types



Partner Types Maintenance screen.

This screen is used to maintain the list of Partner Types, which is used in the **Partnership** section of an opportunity's **Detail** tab.

The following table provides descriptions for the fields of a Partner Type entry:

Company	Company for which the entry is available. * (asterisk) indicates that it is available for all companies.
Company Name	Name of company selected by **Company** field. If asterisk is selected, displays "All Companies".
Code	Code to identify Partner Type entry.
Description	Description of Partner Type entry.

Create New Partner Type

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new Partner Type. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

Edit Entry

Make any necessary edits to an entry and click [**Save**] to save them.

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click the [**Delete Record**] button.

Membership Maintenance

The Membership Maintenance screen is used to maintain two lists. One is the list of professional associations or organizations to which a contact can belong, which is used by the **Association** field on a contact's **Membership** tab. The other list is of Membership Types, which indicates what type of membership members have within their professional association. Membership Types are used by the **Membership Type** field on a contact's **Membership** tab.

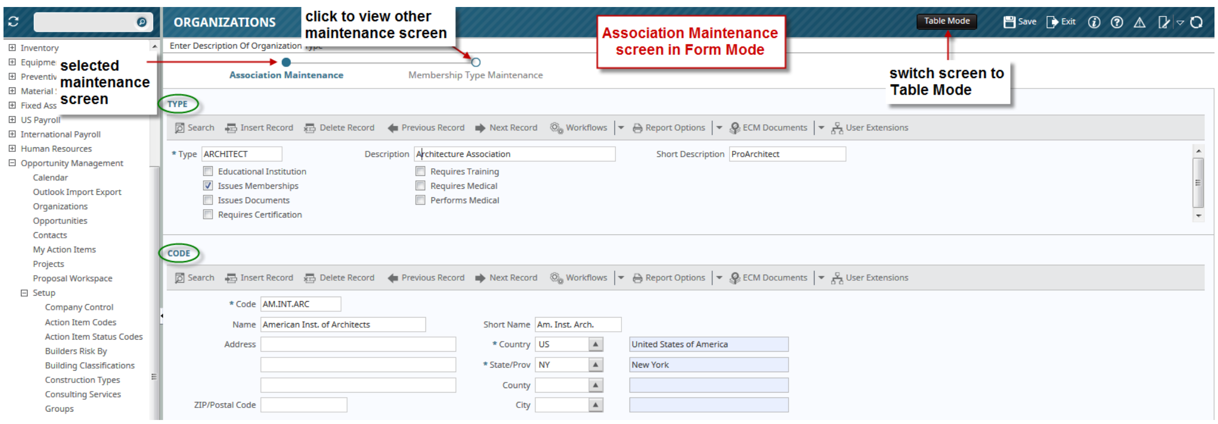
Association Maintenance

There are two types of association records. One type of record is for *association types*, which are general categories, and the other is for *instances of an association type*, which are real, actual associations. For instance, Architecture could be an association type, and the American Institute of Architects located in Washington D.C. would be an instance of an Architecture association type.

In regards to the drop-down lists used to select an association, only records that are of real associations and have their **Issues Memberships** flag set to true are used to populate these lists.

NOTE: This screen maintains the same list of associations (organizations) that the corresponding maintenance screen in the Human Resources module does (**Human Resources > Setup > Local Tables > Organizations**). Therefore, any changes to the list here can impact the Human Resources module.

Form Mode



Association Maintenance screen in Form Mode (displaying a single entry).

The Association maintenance screen in Form Mode displays an association type under the **Type** section, and instances of that association type under the **Code** section. Instances of the association type, detailed in the lower section, share the flag settings with their association type. If an association type has no instances of its type, the fields under the **Code** section will all be blank.

The following table describes the flags and fields under the **Type** section:

Type	Association type (e.g. Architecture, Accounting, Educational Institute, Labor Union).
Description	Description of the association type.
Short Description	Short description of the association type.
Educational Institution	Indicates association is an educational institution.
Requires Training	Indicates association requires training to become a member.
Issues Memberships	Indicates association issues memberships.
Requires Medical	Indicates association requires medical training.
Issues Documents	Indicates association issues documents.
Performs Medical	Indicates association's members perform medical services
Requires Certification	Indicates association requires certification.

The following table describes the fields under the **Code** section, except the address fields:

Code	Code to identify instance of association type (actual association).
Name	Name of the association.
Short Name	Optional; Short name of association.

Navigate between Instances of Association Type

To view instances of an association type, the screen must be in Form Mode. If the type has an instance of itself, it will be displayed in the **Code** section. To view the next instance of an association type, click [**Next Record**] on the Block Toolbar under the **Code** section. When you have passed the last record, the fields under the **Code** section will all be blank. To view the previous instance of an association type, click [**Previous Record**] on the **Code** section's Block Toolbar.

Add New Association Type

To add a new association in Form Mode, click [**Insert Record**] under the **Type** section. Enter the code to identify the new type in the **Type** field, its description in the **Description** field, and optionally, its short description in the **Short Description** field. If you want instances of this type, which would be detailed in the lower section, to be available from drop-down lists specifying an association, check the **Issues Memberships** checkbox. Check any other checkboxes that apply to the association and click [**Save**].

Add New Association Instance

To create a new record for an actual association, its type must have been created. If a suitable type does not exist, create it using the preceding instructions about adding a new type.

The first step to adding a new association instance is to select its type. To do so, you can switch the screen to Table Mode, and click the relevant type's edit icon, or you could also use the [**Search**] option under the **Type** section in conjunction with the [**Previous Record**] and [**Next Record**] options.

Once the type is selected in the **Type** section, you can enter an instance of it in the **Code** section. Click the **Code** section's [**Insert Record**] button, and a new record will appear. Enter a code to identify the association in the **Code** field, enter the name of the association in the **Name** field, and optionally, enter its short name in the **Short Name** field. Also, enter the association's address information. If you want this association to be available in the drop-down lists used to specify an association, ensure that the **Issues Memberships** flag is checked in the **Type** section. Finally, click [**Save**].

Delete Association Instance

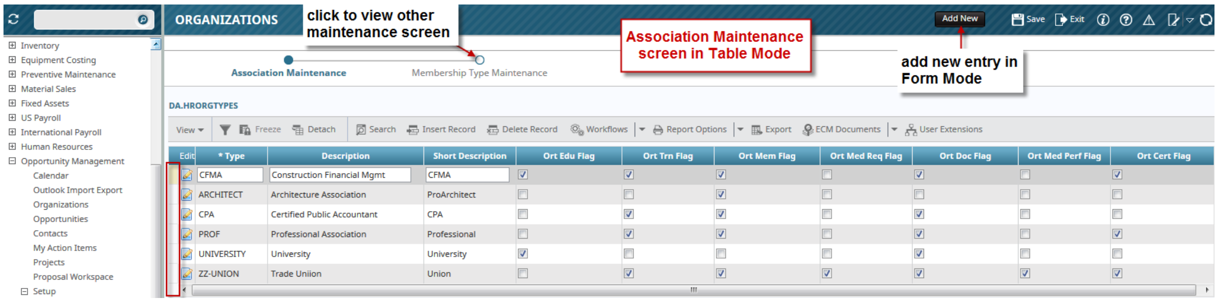
With the association displayed under the **Code** section, click this section's [**Delete Record**] button.

Delete Association Type

To delete a type, you must first delete all instances of that type. With the association type showing under the **Type** section, delete all of its instances, using the **Code** section's [**Delete Record**] button.

After all of the type's instances have been deleted, click [**Save**]. Next, click the **Type** section's [**Delete Record**] button, and click [**Save**].

Table Mode



Association Maintenance screen in Table Mode (listing only association types).

The Association Maintenance screen in Table Mode only displays *association types*. From this screen, you can add a new association type, but you cannot create an instance of an association type, as this screen only displays fields for an association type.

The following table describes the fields and flags for an *association type* entry:

Type	Code to identify the association type record.
Description	Description of the association type.
Short Description	Short description of the association type.
Ort Edu Flag	Indicates association is an educational institution.
Ort Trn Flag	Indicates association requires training to become a member.
Ort Mem Flag	Indicates association issues memberships.
Ort Med Flag	Indicates association requires medical training.
Ort Doc Flag	Indicates association issues documents.
Ort Med Perf Flag	Indicates association's members perform medical services
Ort Cert Flag	Indicates association requires certification.

Add New Association Type

To add a new association type in Table Mode, click the Block Toolbar's [**Insert Record**] button. Enter the code to identify the new association type in the **Type** field, its description/name in the **Description** field, and optionally, its short description/name in the **Short Description** field. If instances of this type are to be available in the drop-down lists that specify an association, check the **Ort Mem Flag** (Issues Memberships). Check any other check-boxes that apply to the instances of this type. Finally, click [**Save**].

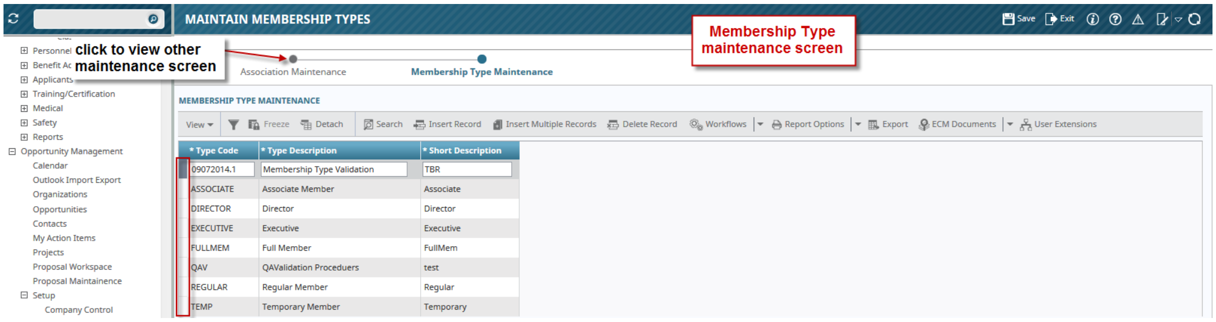
Edit Association Type

Make any necessary edits and click [**Save**].

Delete Association Type

To delete a type, you must first delete all instances of that type. For details, please refer to the *Delete Association Type* instructions under the *Form Mode* sub-section.

Membership Type Maintenance



Membership Type maintenance screen.

This screen is used to maintain the list of Membership Types, which indicate what type of membership a member has within his or her professional association or organization.

NOTE: This screen maintains the same list of Membership Types that the corresponding maintenance screen in the Human Resources module does (**Human Resources > Setup > Codes > Membership Types**). Therefore, any changes to the list here impact the Human Resources module.

The following table describes the fields on this tab:

Type Code	Code to identify the Membership Type entry.
Type Description	Description of the Membership Type.
Short Description	Short description of the Membership Type.

Create New Membership Type

Click the Block Toolbar's [**Insert Record**] button to create a new row for entering information for the new type. Use the above table if you require descriptions for the fields. Click [**Save**] to save the new entry.

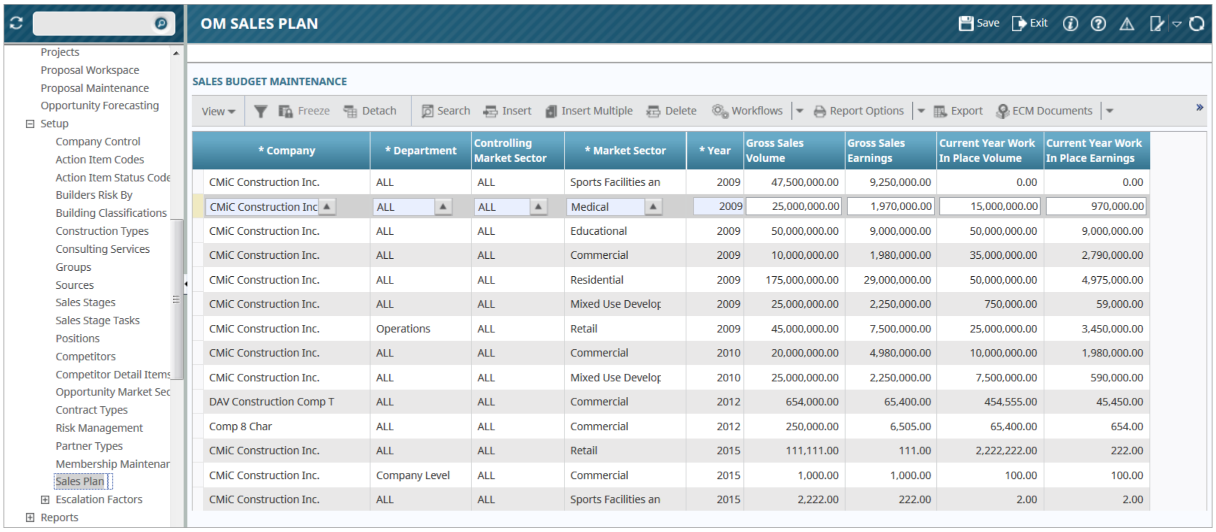
Edit Entry

Make any necessary edits to an entry and click [**Save**].

Delete Entry

Select the entry's row using the selection area, framed by the red rectangle, and click [**Delete Record**].

Sales Plan



Sales Plan Maintenance

This screen allows the entry and editing of the Annual Sales Budgets for each defined Company.

To add a new Sales Plan, click the Block Toolbar's [**Insert**] button.

The following reports make use of sales plan data:

I. Sales Forecast Report

II. Sales Forecast Report Grouped

Data Sheet Set Up

Overview – Data Sheet Set Up

An opportunity's data sheet is used to keep additional, user defined information about an opportunity, which can include industry specific information about an opportunity and its associated bid job, job, and project. The data sheet is composed of user defined groups (sections), and these groups contain user defined fields.

For instance, there could be a section to track project attributes. This section can be broken down by industry type, and each type could contain industry specific attributes. More specifically, you could have sections for educational, commercial, and medical industry types, which contain project attributes specific to the industry types.

Furthermore, the groups and fields on an opportunity's data sheet can be made available or unavailable, depending on the opportunity's data fields and on user defined conditions. For instance, the Opportunity data sheet can be configured so that an opportunity that has its **Market Sector** field set to "**Commercial**" will only have industry sections on its data sheet that are relevant to the Commercial type.

Using the following two maintenance screens, the following steps are required to set up the data sheet for opportunity records:

File Maintenance (standard Treeview path: **System > User Extensions > Field Maintenance**):

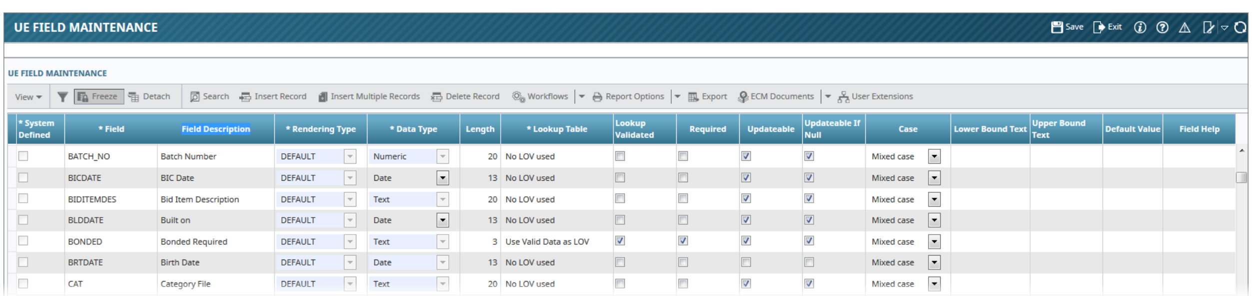
1. Create the user defined fields required for the different sections of the Opportunity data sheet.

Data Sheet Maintenance (standard path: **System > User Extensions > Data Sheet Maintenance**):

2. Create the sections to which user defined fields belong, and add the user defined fields to the sections.

3. Define visibility conditions to control which sections and fields are available for an opportunity's data sheet, based on the opportunity's fields.

Field Maintenance (User Extension Maintenance)

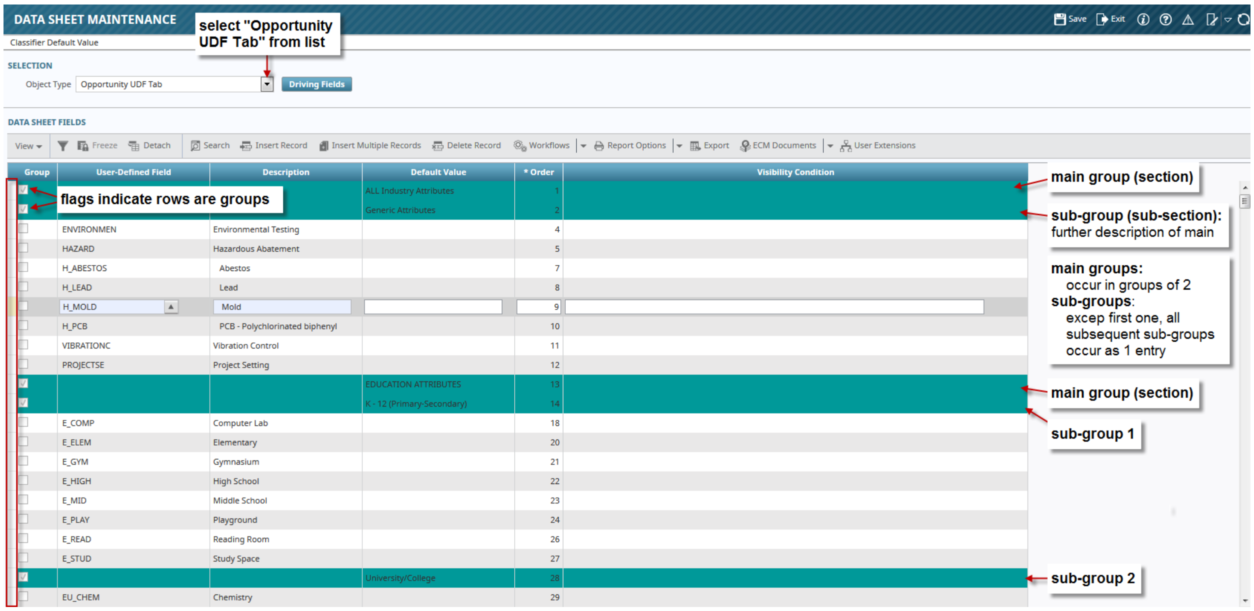


Sample of Field Maintenance screen: ***System > User Extensions > Field Maintenance***

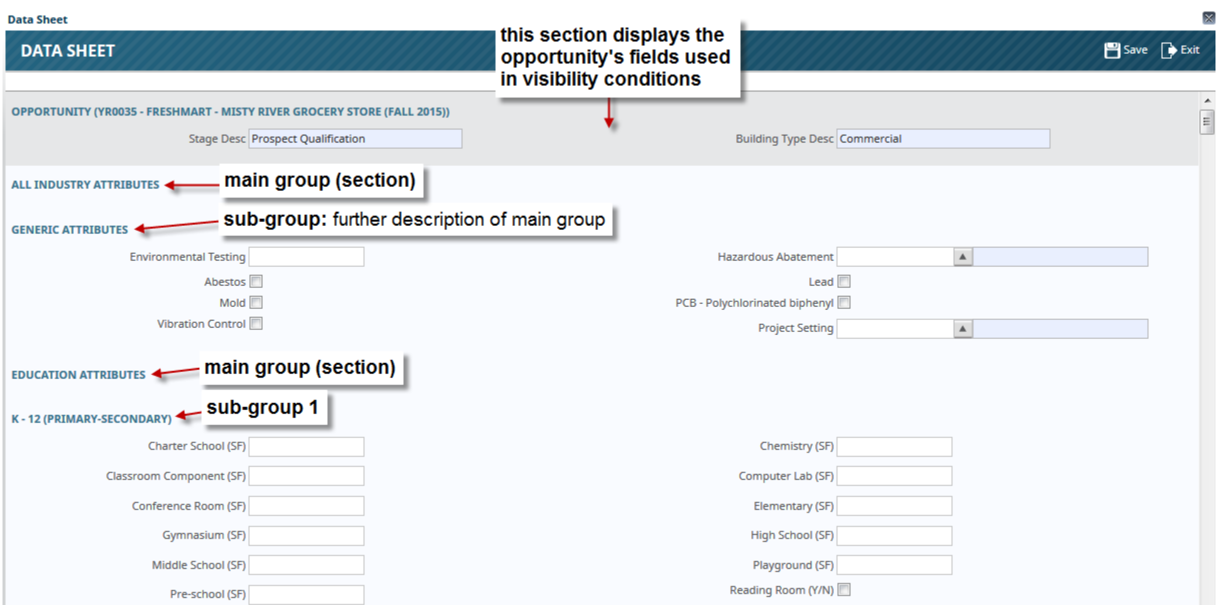
The Field Maintenance screen is reached through the following path: **System > User Extensions > Field Maintenance**. It is used to create and define new data fields, which can be added to various objects throughout CMiC Enterprise that contain user defined fields, such as data sheets. Before the Data Sheet Maintenance screen can be used to add user defined fields, the user defined fields must have been created through this screen.

For instructions on how to add user defined fields, please refer to the *User Extensions* section of the System Data reference guide.

Data Sheet Maintenance



Sample of Data Sheet Maintenance screen: ***System*** *>* ***User Extensions*** *>* ***Data Sheet Maintenance***



Data Sheet created from setup in previous screenshot

The Data Sheet Maintenance screen is reached through the following standard path: **System** > **User Extensions** > **Data Sheet Maintenance**. It is used to specify what groups (sections) appear on data sheets, and what user defined fields appear under each group. It is also used to create visibility conditions, which are conditions used to determine when a group or field is to be available on an opportunity's data sheet, based on the opportunity's fields.

There are data sheets for various types of objects used in CMiC Enterprise. In this section, we are concerned with the data sheet for Opportunity objects. To select the data sheet for Opportunity objects, on the Data Sheet Maintenance screen, select "**Opportunity UDF Tab**" from the **Object Type** drop-down list, as shown in the first screenshot.

There are two types of groups on data sheets, as shown in the above screenshots: Main groups and sub-groups. All main groups appear in groups of two. The first group is the tile of the main group, and the second group is either just a more detailed description of the main group, if there are no sub-groups, or the title of the first sub-group. Except for the first sub-group, which is under its main group, all subsequent sub-groups appear as a single entry.

Create Group

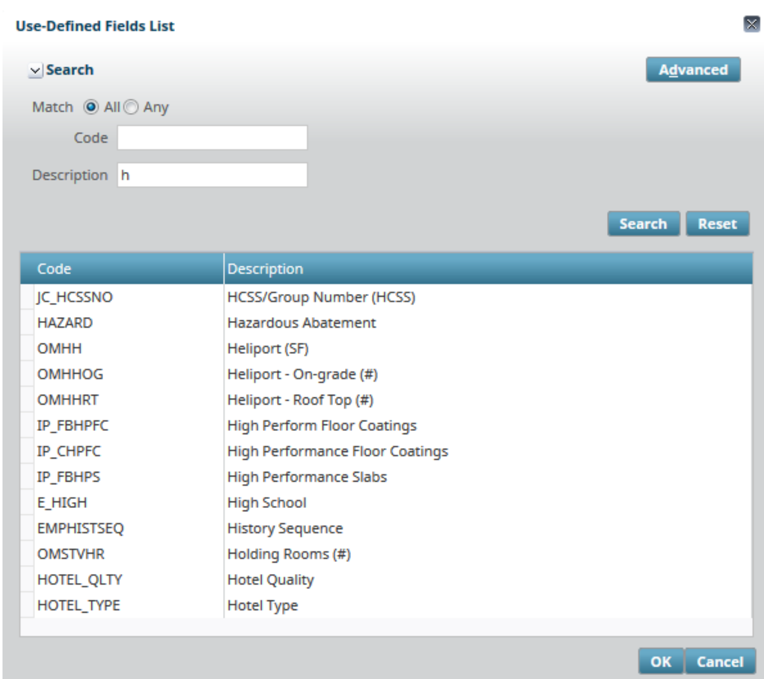
To create a group or sub-group, select the row under which you want the new row to appear, using the selection area framed by the red rectangle. Click [**Insert Record**]. For the new row, click the **Group** check-box, to indicate that the row is for a group (section) on the data sheet. Enter the group's description in the **Description** field, enter the text that is to be displayed on the data sheet in the **Default Value** field, and enter the order in which the group is to appear in the **Order** field.

If the group is a main group, click the [**Insert Record**] button to create a second group under the main group. Recall that all main groups occur in a group of two groups. For the new row, click the **Group** check-box. If the main group has no sub-groups, use this new row to provide a more detailed title or description for the main group, if it does have sub-groups, use this row to detail the first sub-group. Click [**Save**].

Use the following instructions to help you add user defined fields to the created group.

If this group, including its fields, requires a visibility condition to control when it is available, refer to the *Add Visibility Conditions* step.

Add User Defined Fields



To add a user defined field, which was created using the Field Maintenance screen, select the row under which you want the new row to appear, using the selection area framed by the red rectangle. Click [**Insert Record**]. For the new row, click the arrow on **User-Defined Field** to bring up the above window to search for the user defined field. Use the **Search** section to search for the field, by entering the field's **Code** or **Description** and pressing Enter. When the user defined field is found in the lower section, double-click it to select it and close the pop-up window.

Enter the field's label, as it will be displayed on the data sheet, in the **Default Value** field, and enter the order in which the group is to appear in the **Order** field.

If this field requires a visibility condition to control when it is available, refer to the following *Add Visibility Conditions* step.

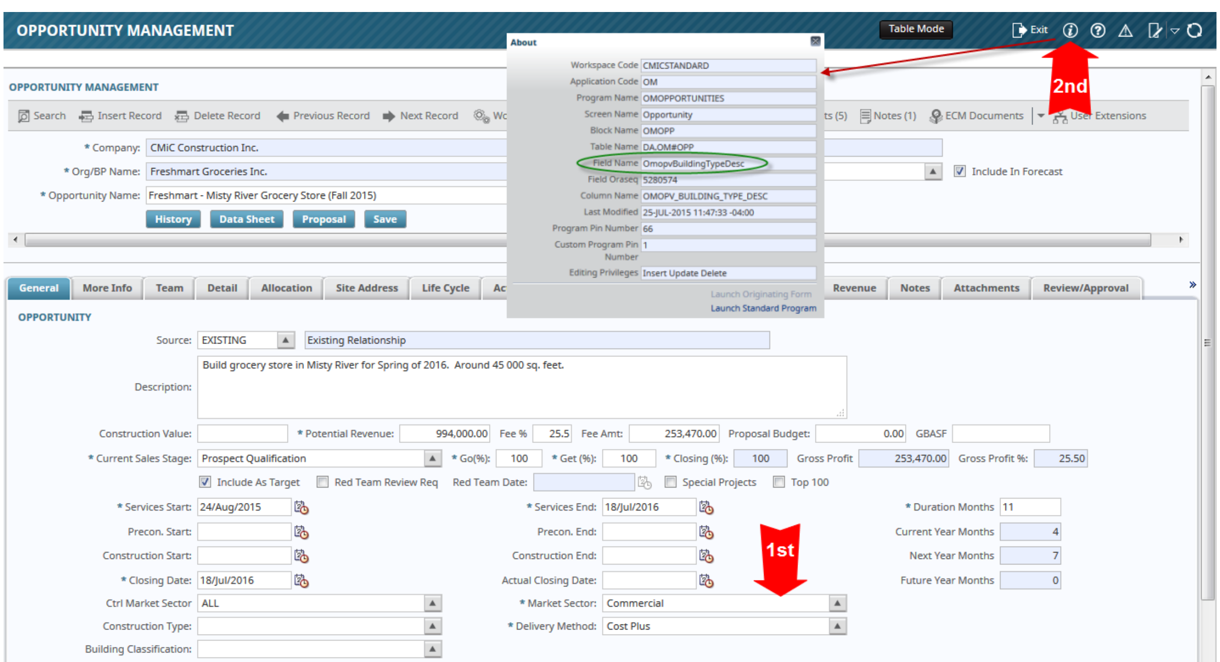
Create Visibility Condition

The Data Sheet Maintenance screen is also used to create visibility conditions for groups or single fields. Note, however, that the visibility condition for a group overrides the visibility conditions for the fields it contains.

Visibility conditions are based on the fields of an opportunity's record. For instance, a data sheet's group that contains fields that are only relevant to opportunities which have their **Market Sector** field set to "**Educational**" can have its visibility condition set so that the group will only appear for opportunities that belong to that specific market sector.

To create a visibility condition, an alias for the opportunity's field that is to be used in the visibility condition must be declared using the Driving Fields screen. First though, the name of the opportunity field, as used within the system, must be discovered using the Main Toolbar's About option (detailed below).

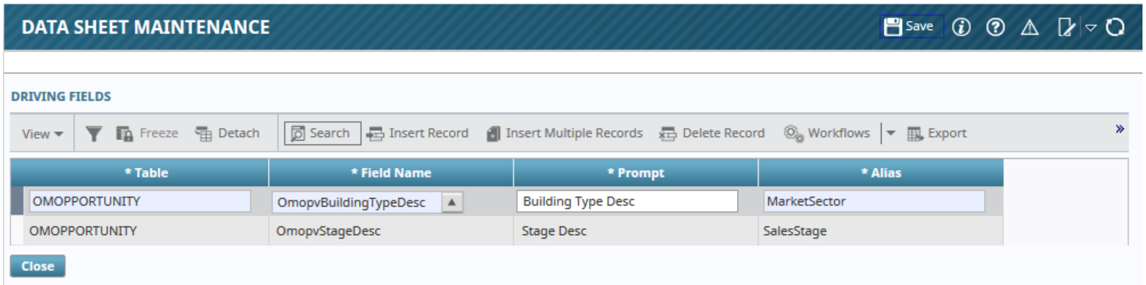
Discover Field's Name



Sample of Opportunity screen.

To find out what an opportunity's field name is, as used in the system, first open an opportunity record. In the Opportunity screen, click the field for which you wish to know its system name (1st red arrow), and then click the About option on the Main Toolbar (2nd red arrow). A little window titled "About" will pop up, as shown in the above screenshot. The field's system name is given by the **Field Name** field in the About window, encircled by the green oval. Using the mouse, highlight and copy this field.

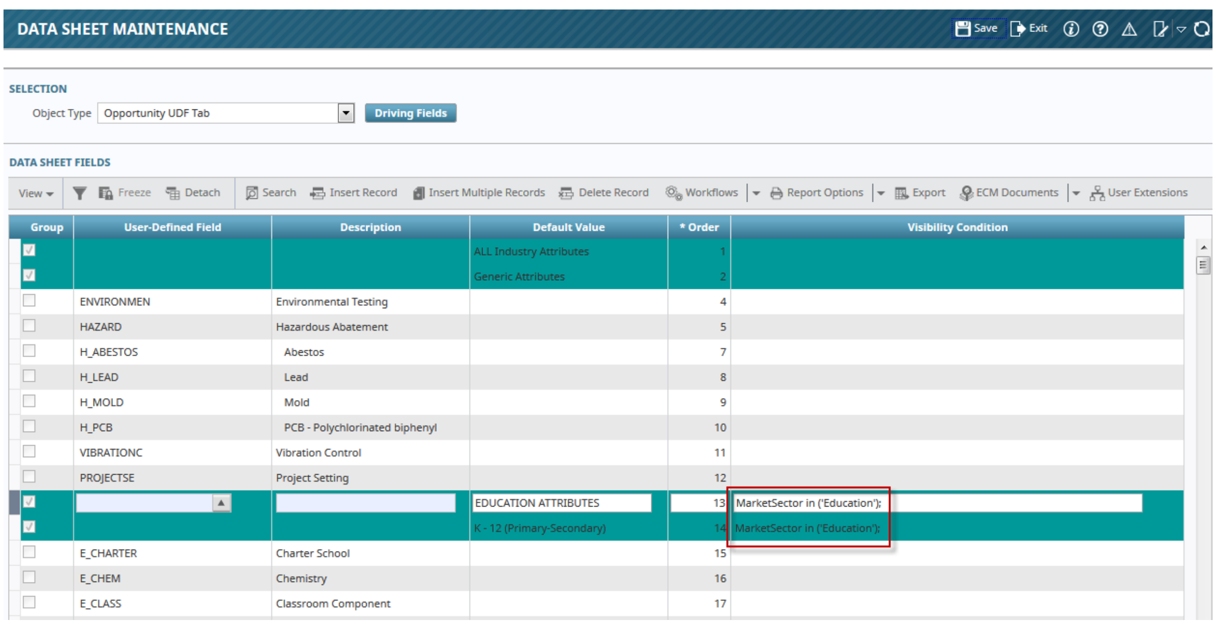
Create Alias for Field



Sample of Driving Fields screen used to create aliases for opportunity fields used in visibility conditions.

Now that the opportunity field's system-name is known, using the previous step, an alias can be created for it. Back in the Data Sheet Maintenance screen, click the [**Driving Fields**] button to open the Driving Fields screen, as shown in the above screenshot. Click [**Insert Record**] to create a new entry for the alias. On the **Field Name** field of the new row, paste the field's system-name, or select it from the list. In the **Alias** field, enter a descriptive alias for the field. For instance, as shown in the above screenshot, for an opportunity's **Market Sector** field with the system name *OmopvBuildingTypeDesc*, the alias *MarketSector* was created.

Create Visibility Condition

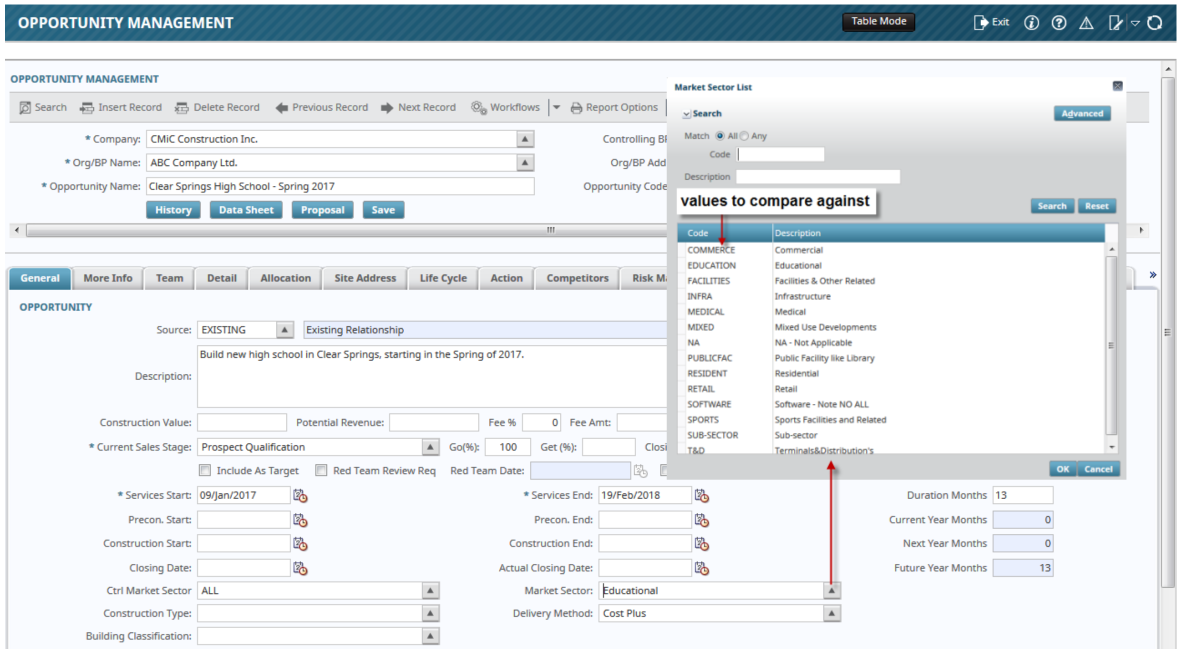


When all of the opportunity fields that are going to be used in a visibility condition are set up with an alias, their aliases can be used to create a visibility condition. Visibility conditions are added to a group or user defined field in the **Visibility Condition** field.

In this case, as shown above, the alias MarketSector is used to create a visibility condition for the Education Attributes group and its K-12 (Primary-Secondary) sub-group. Recall that the visibility condition of a group overrides the visibility condition of its fields, so if the visibility condition of a group evaluates to false, the group and all of its fields will not be visible in the data sheet. In this example, the alias is used to create visibility conditions that limit the visibility of the Education Attributes group, and the K-12 (Primary-Secondary) sub-group and its fields.

The visibility condition used for the two groups, **MarketSector in (‘Education’)**, states that the groups can only appear when the opportunity field specified by the MarketSector alias is set as “**Educational**”. The particular value to compare the alias against is found by looking at the list of values available for the field for which the alias was created. In this case, the alias was created for an opportunity’s **Market Sector** field. To see all of the particular values that can be compared against for this field, see the following step.

View Particular Values of Alias

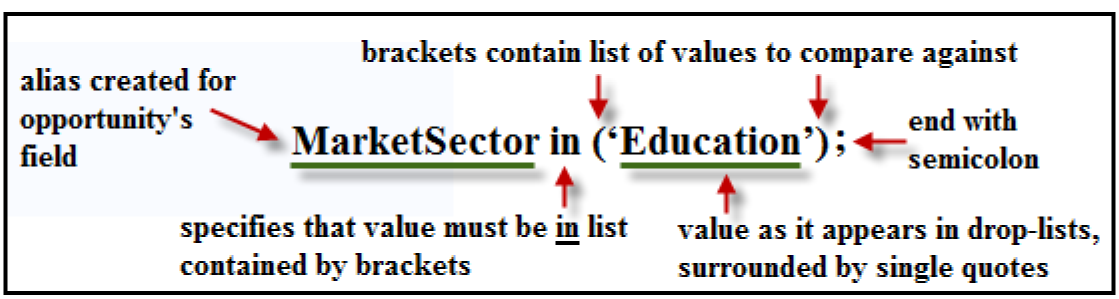


When creating a visibility condition, the values for which to compare the alias against must be known. If the alias was created for a field that uses a drop-down list, launch the Opportunity screen for any opportunity. Next, as shown above, click the arrow on the drop-down list to bring up the little window that lists all of the possible values for the list. The values under the **Code** field are used to compare against, in the visibility condition.

For the visibility condition **MarketSector in (‘Education’)**, the value the **Market Sector** field must be in order for the visibility condition to evaluate to true is “Education”.

Syntax of Visibility Conditions

Part 1: Simple Visibility Conditions & IN, NOT IN Conditions



In regards to a visibility condition’s syntax, the alias appears first, as shown in the above image, followed by the **IN** condition. The **IN** condition specifies that the value of an opportunity’s field, represented by its alias, must be a value in the list contained by the brackets. In the above example, only one entry appears in the list. Each value in the list must be surrounded by single quotes. To complete the visibility condition, a semicolon is used.

To create a visibility condition that specifies that the condition can only evaluate to true if the alias's value is not in the list contained by the brackets, use the condition **NOT IN**, as shown in the following example:

MarketSector NOT IN ('Education');

To list a series of values to compare the alias against, use a comma to separate the list of entries contained by the brackets, and recall that each entry must be surrounded by single quotes, as in the following example:

MarketSector IN ('Education', 'Facilities', 'Infra');

Part 2: Composite Visibility Conditions

A composite visibility condition is composed of two or more simple visibility conditions that are joined by conjunctions. The simple visibility conditions are connected using the conjunctions **AND** and **OR**, creating composite visibility conditions. The symbolization for these conjunctions are as follows:

Conjunction	Symbolization
AND	&&
OR	||

The following is an example of a composite visibility condition, comprised of two simple conditions that are connected by the **AND** conjunction:

MarketSector IN ('Education', 'Facilities', 'Infra') && SalesStage NOT IN ('Preliminary');

Appendix

Importing OM-JSP UDFs & Data into OM-ADF

Overview

This document describes how to import JSP User Defined Fields from the OM-JSP module into the OM-ADF module.

The process consists of 2 parts:

1. **Importing User Defined Fields**

   After this process the imported User Defined fields will appear in the ADF Program. No values will be imported at this stage.

2. **Importing data (actual values)**

   UDF data (field values) will be imported into the ADF program.

The above processes are run using SQL scripts, which are located in the Environment folder:

\uig\utilities\PM_JSP_UDF_to_ADF_UDF

Example: D:\CM\V10X\<*Environment*>\uig\utilities\PM_JSP_UDF_to_ADF_UDF

Importing User Defined Fields

1. Run SQL PLUS and login as user UIG.
2. Run script **clsf_to_udf.sql**.
3. The script will require entering the parameter as described in Table 1 below.
4. Review the script output on the screen. The script output will also be available in **clsf_to_udf.lst** file for future reference.

Importing Data (UDF Values)

1. Run SQL PLUS and login as user UIG.
2. Run script **clsf_to_udf_data_values.sql**.
3. The script will require entering the parameter as described in Table 2 below.
4. Review the script output on the screen. The script output will also be available in **clsf_to_udf_data_values.lst** file for future reference.

Table 1 – Required Parameters for Importing UDFs

Parameter	Description
Destination Program Name	ADF Program Name the UDFs should be imported to. Can be located using About popup in the ADF program.
Destination Block Name	Block (screen section) name in the ADF Program UDFs should be imported to. Can be located using About popup in the ADF program.
Source User-Defined Fields Type Name	User-Defined Fields Type Name from the Source PM JSP. Can be located using program User-Defined Fields from File Maintenance menu (Project Management application).
Enter Position Field Name	Field Name in the destination ADF Program that will be used as a reference to position new fields. This is required in order to place the new fields into a desired location on the screen.
Enter Before/After Flag for Position Field	Enter "**A**" (After) or "**B**" (Before) to place new fields After or Before the "Position field" entered above.

Table 2 – Required Parameters for Importing Data into UDFs

Parameter	Description
Destination Program Name	ADF Program Name the UDF data should be imported to. Can be located using About popup in the ADF program.
Destination Block Name	Block Name in the ADF Program UDF data should be imported to. Can be located using About popup in the ADF program.
Source User-Defined Fields Type Name	User-Defined Fields Type Name from the Source PM JSP. Can be located using program User-Defined Fields from File Maintenance menu (Project Management application).

IMPORTANT NOTE

CMiC recommends that this should be a one-time process. Once fields and values are imported into an ADF Program, users have to use this ADF Program only to maintain UDF data.

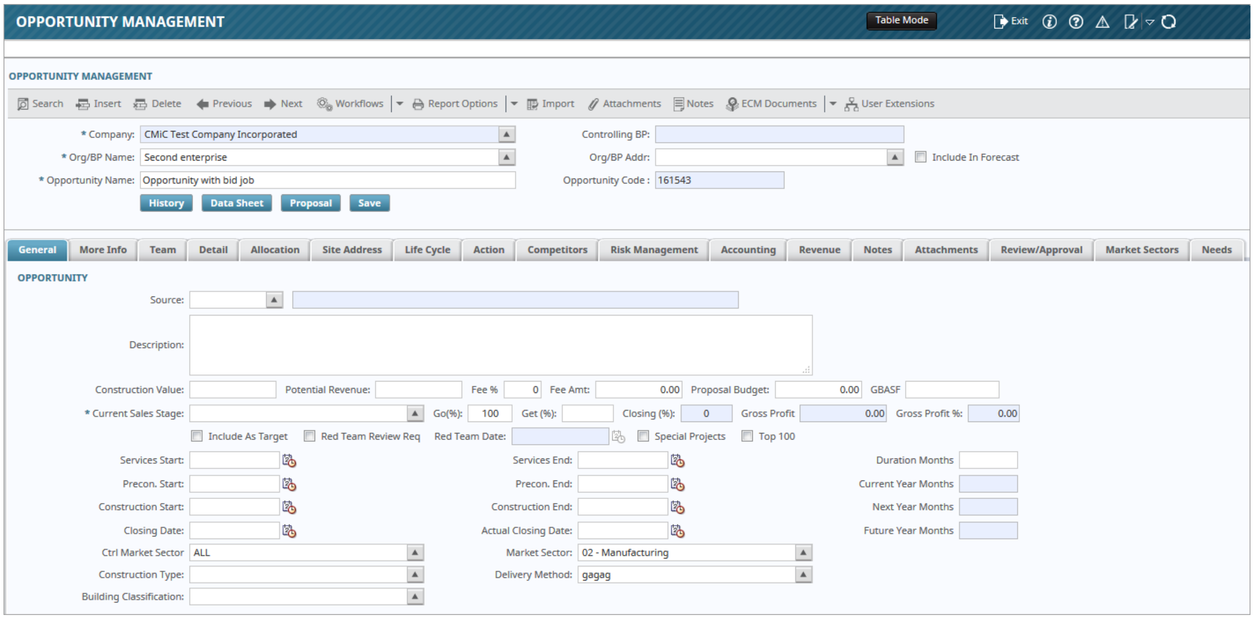
Below is what will happen if you run the above processes more than once:

Process	Expected Results if run more than once
Importing User Defined Fields	If a User Defined field already exists in a destination ADF Program, it will be ignored. If a User Defined field does not exist in a destination ADF Program, it will be imported.
Importing data (actual values)	New values are be imported, and existing values are updated. No values will be deleted: meaning if a JSP UDF value has been deleted since the last import, the corresponding ADF UDF value will not be deleted.

Example of Importing OM Opportunity User Defined Fields & Data.

In this example, we import Opportunity User Defined fields from PM JSP to ADF Program "Opportunities" in Opportunity Management. The fields will be imported to the General Tab after the last field which is "Building Classification".

The Opportunity Program screen before UDF import:



Part 1: **Import UDFs Using Script**

1. Run SQL PLUS and login as UIG.

```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\CMiC_patch\utilities\PM_JSP_UDF_to_ADF_UDF>sqlplus uig/uigpass@database_name

SQL*Plus: Release 11.2.0.1.0 Production on Mon Jan 16 10:42:54 2017

Copyright (c) 1982, 2010, Oracle.  All rights reserved.


Connected to:
Oracle Database 11g Release 11.2.0.3.0 - 64bit Production

SQL> _
```

2. Run **clsf_to_udf.sql** script:

```
Connected to:
Oracle Database 11g Release 11.2.0.3.0 - 64bit Production

SQL> start clsf_to_udf.sql_
```

3. The script description will appear. Press any key to continue:

```
This script will import JSP PM User Defined Fields into ADF User Defined Fields.
Only Fields (Fields definitions) will be imported and added into the specified program screen
 - no fields values will be imported by this script.

Press any key to continue or press CTRL-C to cancel
```

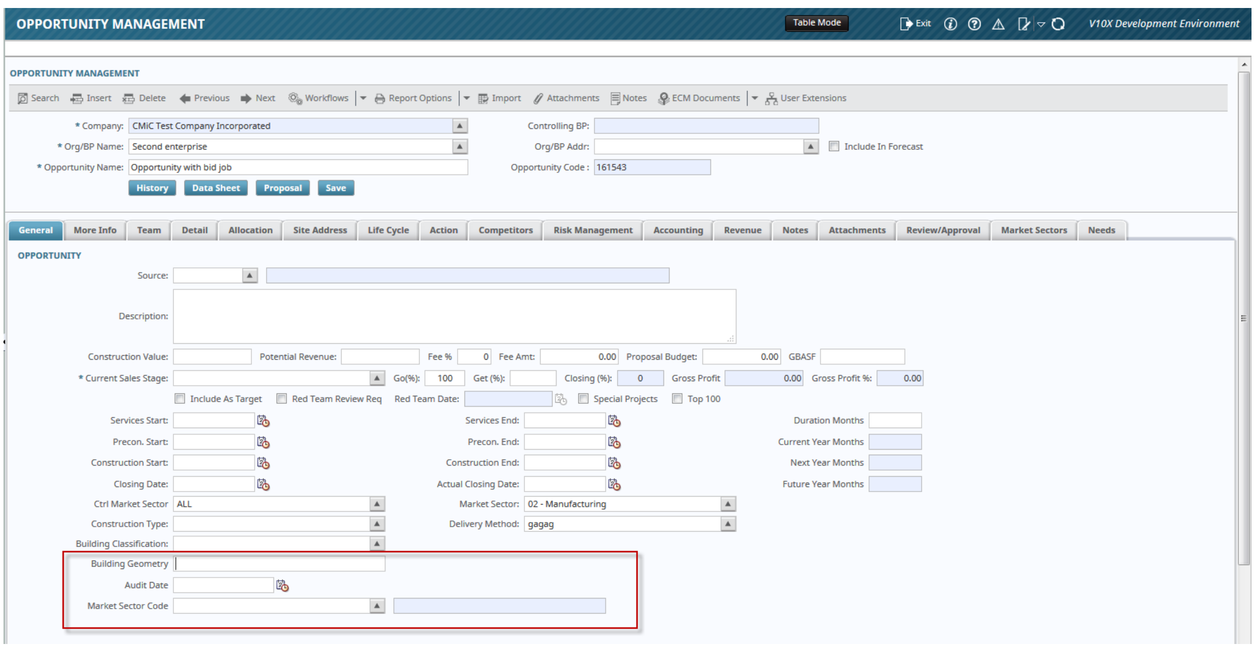
4. Enter required parameters (see below how to get the parameter values):

```
This script will import JSP PM User Defined Fields into ADF User Defined Fields
Only Fields (Fields definitions) will be imported and added into the specified

Press any key to continue or press CTRL-C to cancel

clsf_to_udf.sql STARTED

Enter Destination Program Name: OMOPPORTUNITIES
Enter Destination Block Name: OMOPP
Enter Source User-Defined Fields Type Name: Opportunity
Enter Position Field Name: OmopvBuildingClassDesc
Enter Before/After Flag for Position Field (valid values: B and A): A
```

5. Listed 3 fields are imported:

```
This script will import JSP PM User Defined Fields into ADF User Defined Fields.
Only Fields (Fields definitions) will be imported and added into the specified p

Press any key to continue or press CTRL-C to cancel

clsf_to_udf.sql STARTED

Enter Destination Program Name: OMOPPORTUNITIES
Enter Destination Block Name: OMOPP
Enter Source User-Defined Fields Type Name: Opportunity
Enter Position Field Name: OmopvBuildingClassDesc
Enter Before/After Flag for Position Field (valid values: B and A): A

Added field: MS_CODE
Added field: AUDIT_DATE
Added field: BLDGEOM

SQL>
```

Opportunities Program screen after Fields Import with imported UDFs:



Part 2: **Import Data**

1. Run SQL PLUS and login as UIG.

```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\CMiC_patch\utilities\PM_JSP_UDF_to_ADF_UDF>sqlplus uig/ uigpass@database_name

SQL*Plus: Release 11.2.0.1.0 Production on Mon Jan 16 10:42:54 2017

Copyright (c) 1982, 2010, Oracle.  All rights reserved.


Connected to:
Oracle Database 11g Release 11.2.0.3.0 - 64bit Production

SQL> _
```

2. Run **clsf_to_udf_data_values.sql** script:

```
Connected to:
Oracle Database 11g Release 11.2.0.3.0 - 64bit Production

SQL> start clsf_to_udf_data_values.sql
```

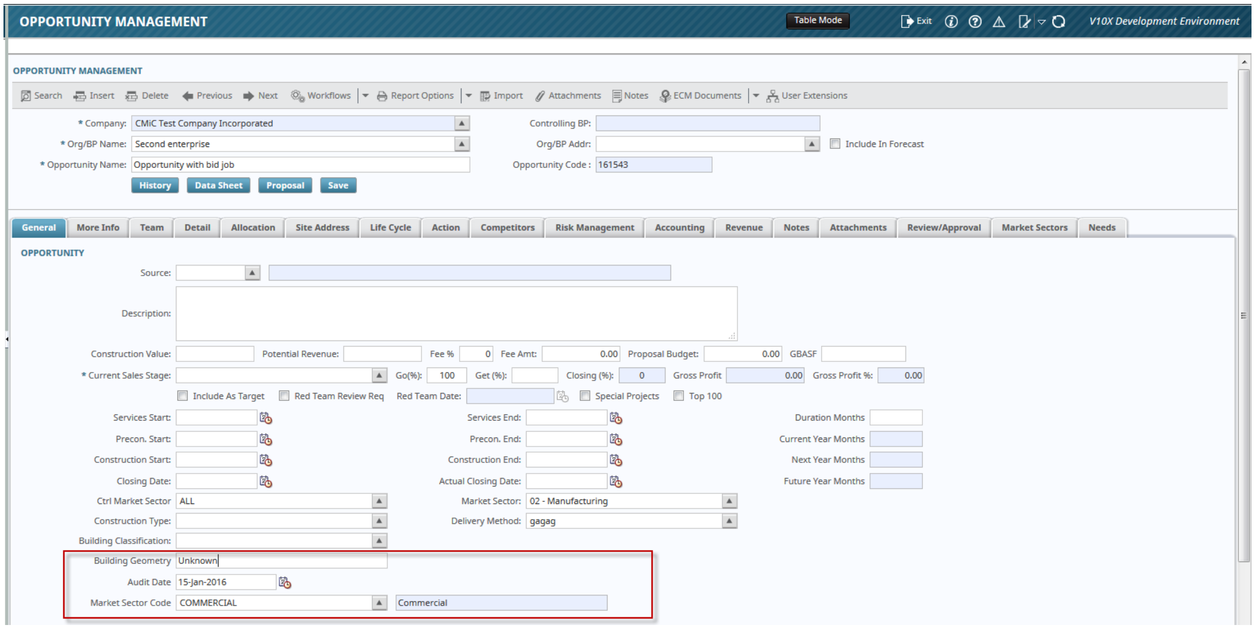
3. The script description will appear. Press any key to continue:

```
This script will import data (actual values) from JSP PM User Defined Fields into ADF User Defined Fields.
NOTE: the corresponding ADF User Defined Fields must already exist in the ADF program.

Press any key to continue or press CTRL-C to cancel
_
```

4. Enter required parameters (see below how to get the parameter values). The data will be imported.

```
This script will import data (actual values) from JSP PM User Defined Fields into ADF User Defined Fields.
NOTE: the corresponding ADF User Defined Fields must already exist in the ADF program.

Press any key to continue or press CTRL-C to cancel

clsf_to_udf_data_values.sql STARTED


Enter Destination Program Name: OMOPPORTUNITIES
Enter Destination Block Name: OMOPP
Enter Source User-Defined Fields Type Name: Opportunity


Records imported.


SQL> _
```

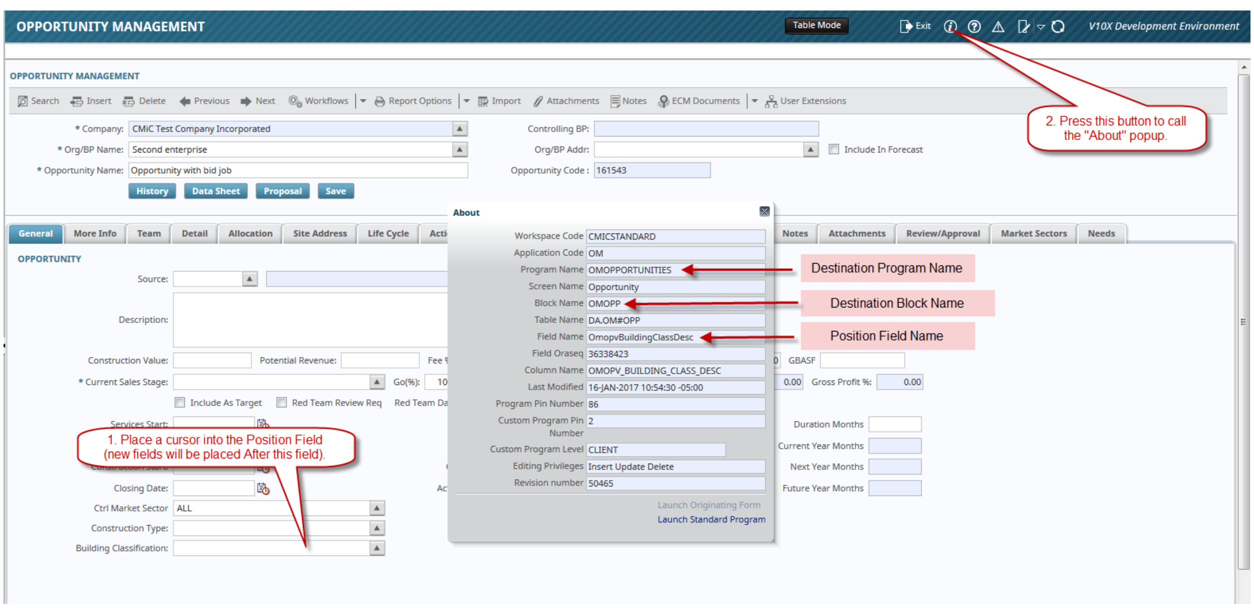
Opportunities Program screen with imported data:



How to Get Parameters for Scripts

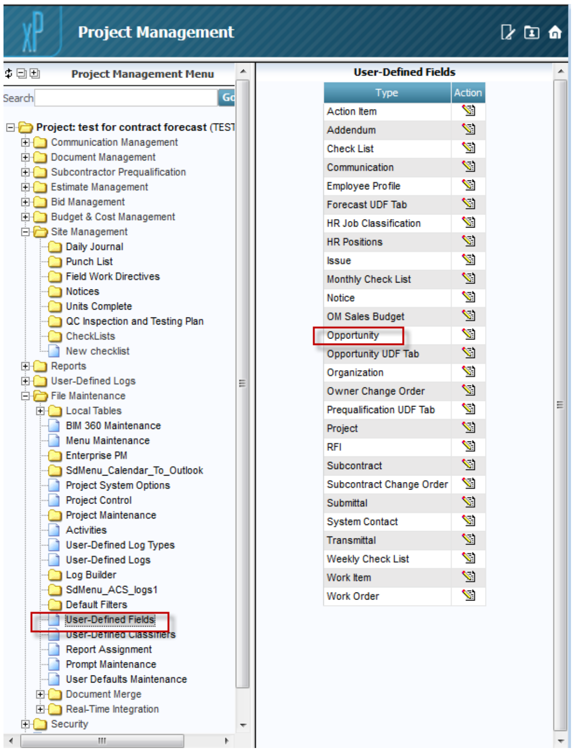
Part 1: **Import UDFs Using Script**

In order to get parameters “Destination Program Name”, “Destination Block Name”, “Position Field Name” for the example above, run the destination ADF program (Opportunity Management => Opportunities) and get the parameter values as described on the screenshot:



Part 2: **Import Data**

In order to get the value for parameter “Source User-Defined Fields Type Name”, open the User-Defined Fields program from “Project Management” => “File Maintenance” menu and copy a corresponding Type Name:



Index

[

A

B

C

D

E

F

G

H

I

L

M

N

O

P

Q

R

S

T

V