



OPPORTUNITY MANAGER

A BRAND NEW



APP THAT YOU CANNOT MISS

USER GUIDE

VERSION 1.6

APP DESCRIPTION GUIDE



Algoworks

Why this Application?



- Opportunity Manager plug-in built for Salesforce platform by Algoworks has been inspired by the demands, likeability and need of the platform users who have been providing us feedback for years.
- The new plug-in has been designed **intuitively** and **ingeniously** to better the current implementation and equip the users with **powerful** features with more ease and comfort.

Application Goal



- Ability to have all the *opportunity* records in a single page
- Better interactive records.
- To minimize the time and record updating / inserting effort.
- Introduce powerful info-graphics tool- data via **charts**.
- Ability to view live deals distributed stage-wise

The Four C's objective should not be lost in the meanwhile...

Concise

Comprehensive

Consolidated

Compact

Project Features – A Summary



A fresh-tabular-min-clicks-no-refresh listing of opportunities PLUS -+Fully customizable

Drag and drop feature that will help users to minimize their record updating and time effort .

Ability to view live deals distributed stage-wise of opportunity

- Making tracking deals easy
- Essential details visible in one glance

Easy, fast and quick way around to update records.

Introduce powerful info-graphics tool- data via **charts**, Better view of all the data by the use relevant types of:

- pie graphs
- bar graphs

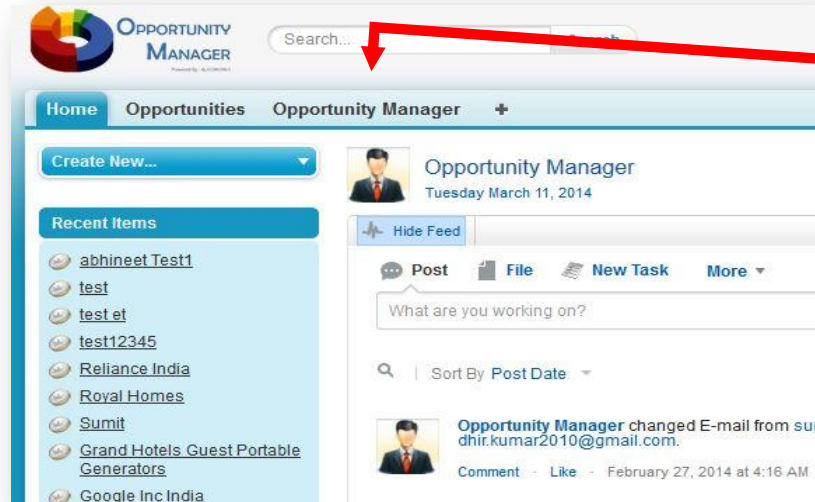
Interactive Pagination and record view mode.

Multi-currency support

Starting the App



- After the successful installation of the plug-in, the Opportunity Manager tab appears on the main menu tab
- Clicking on the same will load the *Opportunity Manager* home page



First Look

1/3





OPPORTUNITY
MANAGER

Search...

Search

Nauman Ahmad Setup Help Opportunity Manager

Home Opportunities Opportunity Manager

Opportunities

User Guide Help for this page

Stage

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quote

All

Lead Source

--None--

Opportunity Type

--None--

Forecast Category

--None--

Open/Closed

--None--

Timeframe

All time

Only own records

☐

Account

Campaign

Query

Reset Filter

Export To Excel

Field-level filtering options are available for each column.
To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

To know more about Algoworks, please visit "www.algoworks.com/crm".

For any queries / suggestions, please contact us at "oppmanager@algoworks.com".



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All

Count

Stage

Pie chart showing All based on Count And Stage



Opportunities

Opportunity Pipeline

Add

Clear Filter Data

Account Name	Amount	Close Date	CreatedBy Name	Lead Source	Name	Owner Name	Stage
USD 0.00	USD 0.00	Sort Ascending	Nauman Ahmad		test2	Nauman Ahmad	Qualification
USD 0.00	USD 0.00	Sort Descending	Nauman Ahmad		test1	Nauman Ahmad	Prospecting
Edge Communicati...	USD 60,000.00		Nauman Ahmad	Word of mouth	Edge SLA	Nauman Ahmad	Closed Won
Grand Hotels & Re...	USD 15,000.00		Nauman Ahmad		Grand Hotels Kitch...	Nauman Ahmad	Id. Decision Makers
Grand Hotels & Re...	USD 90,000.00		Nauman Ahmad	External Referral	Grand Hotels SLA	Nauman Ahmad	Closed Won
Express Logistics a...	USD 80,000.00		Nauman Ahmad	External Referral	Express Logistics...	Nauman Ahmad	Needs Analysis
Express Logistics a...	USD 120,000.00		Nauman Ahmad	External Referral	Express Logistics...	Nauman Ahmad	Value Proposition
Express Logistics a...	USD 220,000.00	04/15/2012	Nauman Ahmad	Trade Show	Express Logistics...	Nauman Ahmad	Proposal/Price Quote
University of Arizona	USD 190,000.00	04/15/2012	Nauman Ahmad	Employee Referral	University of AZ Ins...	Nauman Ahmad	Id. Decision Makers
University of Arizona	USD 50,000.00	04/15/2012	Nauman Ahmad	Public Relations	University of AZ Po...	Nauman Ahmad	Closed Lost
University of Arizona	USD 90,000.00	04/15/2012	Nauman Ahmad	Public Relations	University of AZ SLA	Nauman Ahmad	Proposal/Price Quote
United Oil & Gas C...	USD 440,000.00	04/15/2012	Nauman Ahmad	External Referral	United Oil Emergen...	Nauman Ahmad	Perception Analysis
United Oil & Gas C...	USD 270,000.00	04/15/2012	Nauman Ahmad	Partner	United Oil Installations	Nauman Ahmad	Negotiation/Review
United Oil & Gas C...	USD 270,000.00	04/15/2012	Nauman Ahmad		United Oil Installations	Nauman Ahmad	Qualification
United Oil & Gas C...	USD 125,000.00	04/15/2012	Nauman Ahmad		United Oil Office Po...	Nauman Ahmad	Perception Analysis
GenePoint	USD 85,000.00	04/15/2012	Nauman Ahmad	Partner	GenePoint Standby...	Nauman Ahmad	Closed Won
Burlington Textiles...	USD 235,000.00	04/15/2012	Nauman Ahmad	Web	Burlington Textiles...	Nauman Ahmad	Closed Won
United Oil & Gas C...	USD 235,000.00	04/15/2012	Nauman Ahmad	External Referral	United Oil Installations	Nauman Ahmad	Closed Won
United Oil & Gas C...	USD 675,000.00	04/15/2012	Nauman Ahmad		United Oil Plant Sta...	Nauman Ahmad	Prospecting

Page 1 of 2

Displaying objects 1 - 20 of 34

20 Items per page

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First Look

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 **OPPORTUNITY MANAGER**
POWERED BY ALGOWORKS

Search...

Nauman Ahmad ▾ Setup Help **Opportunity Manager** ▾

Home Opportunities **Opportunity Manager** +

Opportunities User Guide | Help for this page ?

Stage

Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote

☒ All

Lead Source

--None--

Opportunity Type

--None--

Forecast Category

--None--

Open|Closed

--None--

Timeframe

All time

☐ Only own records

Account

Campaign

Field-level filtering options are available for each column.
To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

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For any queries / suggestions, please contact us at "oppmanager@algoworks.com".





- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

All ▾ Count ▾ Stage ▾

Pie chart showing All based on Count And Stage

Opportunities Opportunity Pipeline

Account Name	Amount	Close Date	CreatedBy Name	Lead Source	Name	Owner Name	Stage
	USD 0.00	10/29/2014	Nauman Ahmad		test2	Nauman Ahmad	Qualification
	USD 0.00	10/29/2014	Nauman Ahmad		test1	Nauman Ahmad	Prospecting
	USD 0.00	07/02/2014	Nauman Ahmad		All	Nauman Ahmad	Prospecting
Edge Communicati...	USD 60,000.00	04/15/2012	Nauman Ahmad	Word of mouth	Edge SLA	Nauman Ahmad	Closed Won
Grand Hotels & Re...	USD 15,000.00	04/15/2012	Nauman Ahmad		Grand Hotels Kitch...	Nauman Ahmad	Id. Decision Makers
Grand Hotels & Re...	USD 90,000.00	04/15/2012	Nauman Ahmad	External Referral	Grand Hotels SLA	Nauman Ahmad	Closed Won

First Look

3/3



Opportunity Manager

Search... Search

Nauman Ahmad Setup Help Opportunity Manager

Home Opportunities Opportunity Manager

Opportunities

Stage: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Quote

Lead Source: --None--

Opportunity Type: --None--

Forecast Category: --None--

Open/Closed: --None--

Timeframe: All time

Account: Only own records

Campaign:

Query Reset Filter Export To Excel

Field-level filtering options are available for each column. To access filters, hover over the field name and click on the down arrow, then select the desired filters.

Double click on the particular Opportunity record to edit it.

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Pie chart showing All based on Count And Stage

Opportunities Opportunity Pipeline

Prospecting	Qualification	Needs Analysis	Value Proposition	Id. Decision Makers	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Closed
5 Deals USD 335,000	3 Deals USD 305,000	2 Deals USD 95,000	2 Deals USD 370,000	2 Deals USD 115,000	2 Deals USD 565,000	3 Deals USD 580,000	3 Deals USD 270,000	13 Deals USD 270,000
Pyramid Emergency Generators USD 100,000 Pyramid Construction Inc.	Edge Emergency Generator USD 35,000 Edge Communications	Dickenson Mobile Generators USD 15,000 Dickenson plc	Grand Hotels Guest Portable Generators USD 250,000 Grand Hotels & Resorts Ltd	University of AZ Installations USD 100,000 University of Arizona	United Oil Office Portable Generators USD 125,000 United Oil & Gas Corp.	United Oil Refinery Generators USD 270,000 United Oil & Gas Corp.	United Oil Installations USD 270,000 United Oil & Gas Corp.	Edge SL USD 60,000 Edge Commu
GenePoint Lab Generators USD 250,000 GenePoint	United Oil Installations USD 250,000 United Oil & Gas Corp.	Express Logistics Portable Truck Generators USD 80,000 Express Logistics and Transport	Express Logistics SLA USD 120,000 Express Logistics and Transport	Grand Hotels Kitchen Generator USD 15,000 Grand Hotels & Resorts Ltd	United Oil Emergency Generators USD 440,000 United Oil & Gas Corp.	University of AZ SLA USD 90,000 University of Arizona	Express Logistics Standby Generator USD 220,000 Express Logistics and Transport	Grand H Emergent Installations USD 950,000 Grand Hotels & Resorts Ltd
United Oil Plant Standby Generators USD 675,000 United Oil & Gas Corp.	test2							Grand H Emergent Generator USD 210,000 Grand Hotels & Resorts Ltd
All								Edge Installation USD 90,000 Edge Commu
test1								Edge Emergent Generator USD 75,000 Edge Commu

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Features Description



- On the Home screen of *Opportunity Manager*, three columns of pre-filters are provided which will determine the set of records to be displayed in the table below.

The screenshot displays the 'Opportunity Manager' interface. A red circle highlights the filter section on the left, which includes a 'Stage' dropdown menu (with options: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Quote) and a 'Lead Source' dropdown menu (with option: --None--). Other filters include 'Opportunity Type', 'Forecast Category', 'Open/Closed', 'Timeframe', 'Account', and 'Campaign'. A red arrow points from the 'Stage' dropdown to a pie chart on the right. The pie chart is titled 'Pie chart showing All based on Count And Stage' and shows the distribution of opportunities across stages. A legend for the pie chart is provided on the right.

Opportunities

Stage: Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote

Lead Source: --None--

Opportunity Type: --None--

Forecast Category: --None--

Open/Closed: --None--

Timeframe: All time

☐ Only own records

Account:

Campaign:

Field-level missing options are available for each column.
To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

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All Count Stage

Pie chart showing All based on Count And Stage

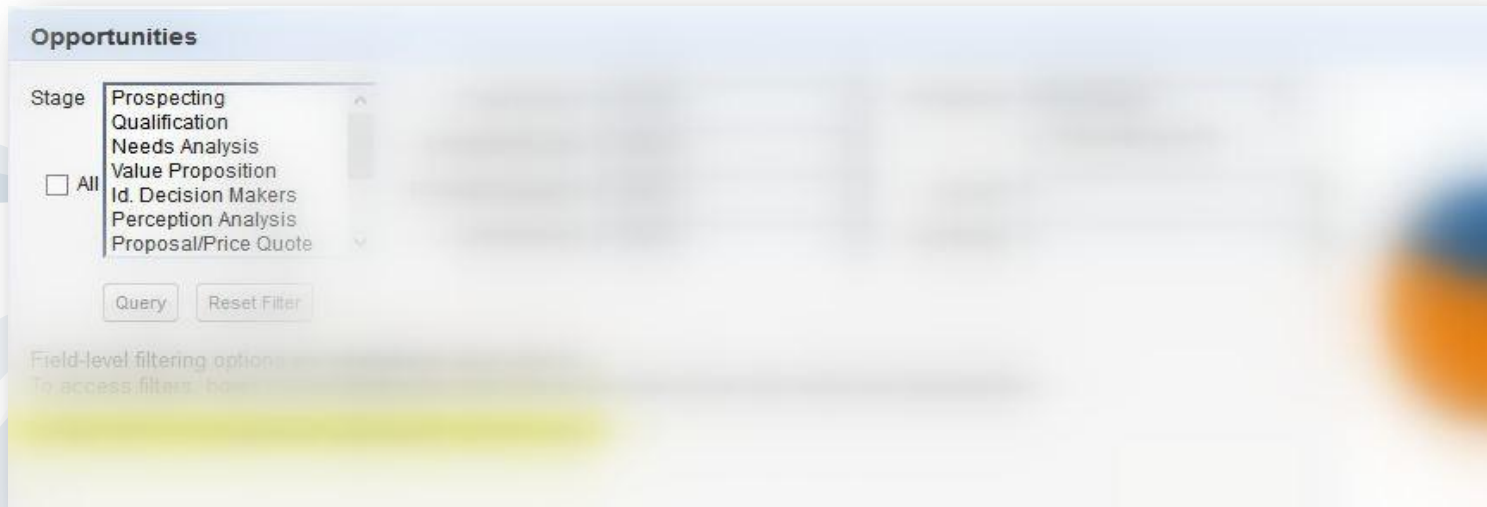
Legend:

- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

Features Description



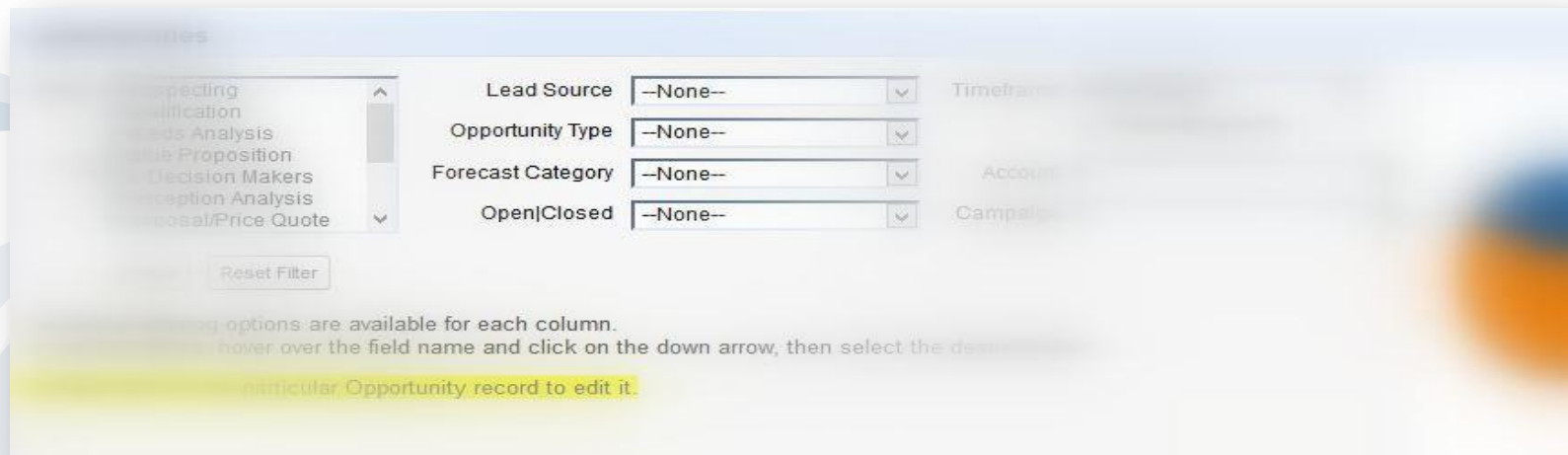
- The first column has Stage Filter



Features Description



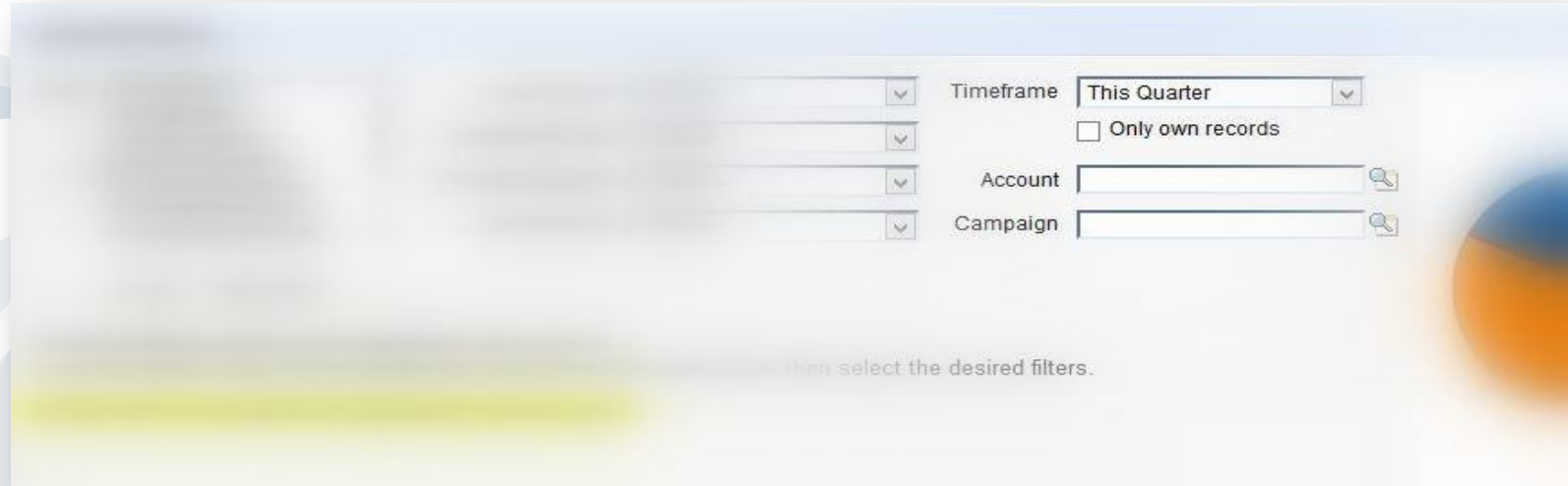
- The second column has *Lead Source*, *Opportunity Type*, *Forecast Category* and *Open/Closed* filters.



Features Description



- The third column has *Timeframe*, *Account* and *Campaign* filters.

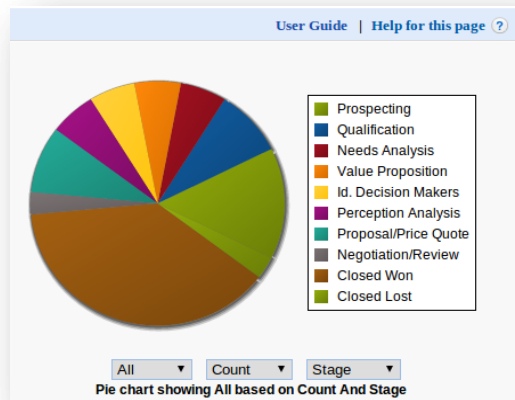


Features Description- Charts



One of the most captivating feature of this Salesforce plug-in is the chart-generation feature. Some highlights of the same are as follows:

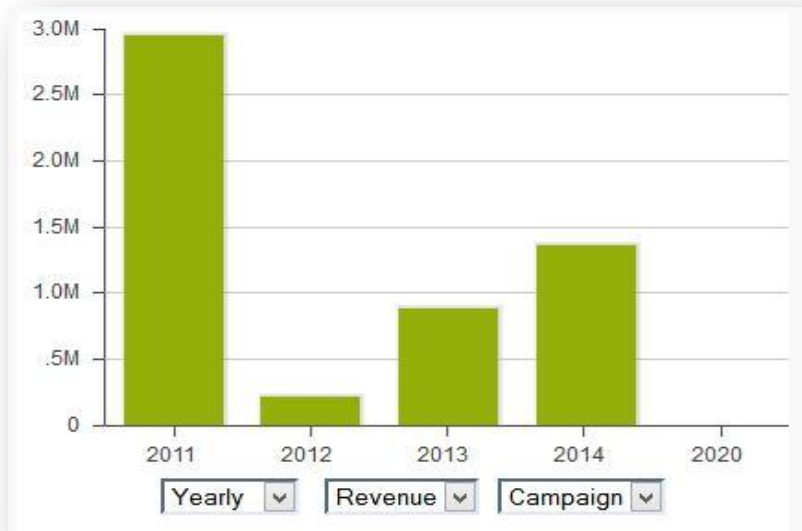
1. Appears in a fraction of second when filters are changed. Instant results!
2. Changing filters changes the way of representation of the data as well.



Features Description- Charts



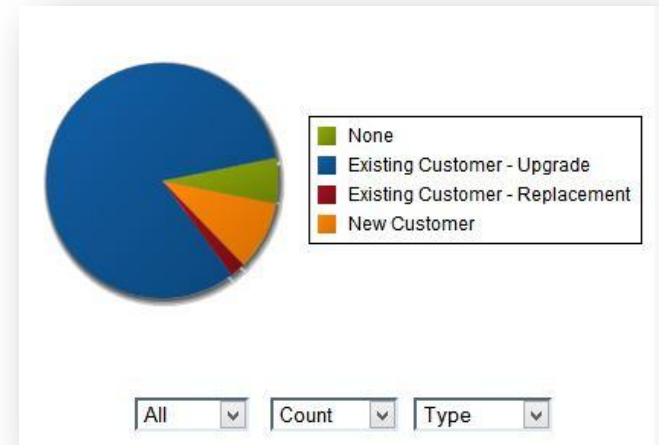
3. Some data is represented via PIE-graph while others may be presented in bar-graph.



Features Description- Charts



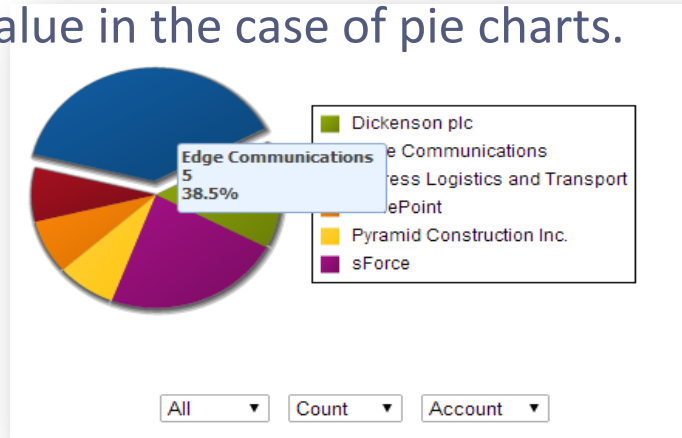
- There are **three filters** provided powering user to see trends in the most **intuitive** and useful manner to get to the right conclusions helping user to analysis easier.
- On mouse hovering on chart, it will display the no of records and the percentage along with the name.



Features Description- Charts



6. On the basis of the value selected in the pick-list(at the bottom), the chart will re-generate & show records instantly
7. Hovering with mouse on various elements of the graphs gives a text-feed in return describing the details of the chosen filters and the meaning of what data is presented on the axis in the case of line/bar graphs and the percentage of the value in the case of pie charts.



Features Description- Pagination



- Pagination will help user to scroll through all the records and select the no. of records to be shown at once .

Opportunities							
Opportunity Pipeline							
Add Clear Filter Data							
Account Name	Amount	Close Date	CreatedBy Name	Lead Source	Name	Owner Name	Stage
	USD 0.00	10/29/2014	Nauman Ahmad		test2	Nauman Ahmad	Qualification
	USD 0.00	10/29/2014	Nauman Ahmad		test1	Nauman Ahmad	Prospecting
	USD 0.00	07/02/2014	Nauman Ahmad		All	Nauman Ahmad	Prospecting
Edge Communicati...	USD 60,000.00	04/15/2012	Nauman Ahmad	Word of mouth	Edge SLA	Nauman Ahmad	Closed Won
Grand Hotels & Re...	USD 15,000.00	04/15/2012	Nauman Ahmad		Grand Hotels Kitch...	Nauman Ahmad	Id. Decision Makers
Grand Hotels & Re...	USD 90,000.00	04/15/2012	Nauman Ahmad	External Referral	Grand Hotels SLA	Nauman Ahmad	Closed Won
Express Logistics a...	USD 80,000.00	04/15/2012	Nauman Ahmad	External Referral	Express Logistics ...	Nauman Ahmad	Needs Analysis
Express Logistics a...	USD 120,000.00	04/15/2012	Nauman Ahmad	External Referral	Express Logistics ...	Nauman Ahmad	Value Proposition
Express Logistics a...	USD 220,000.00	04/15/2012	Nauman Ahmad	Trade Show	Express Logistics ...	Nauman Ahmad	Proposal/Price Quote
University of Arizona	USD 100,000.00	04/15/2012	Nauman Ahmad	Employee Referral	University of AZ Ins...	Nauman Ahmad	Id. Decision Makers
University of Arizona	USD 50,000.00	04/15/2012	Nauman Ahmad	Public Relations	University of AZ Po...	Nauman Ahmad	Closed Lost
University of Arizona	USD 90,000.00	04/15/2012	Nauman Ahmad	Public Relations	University of AZ SLA	Nauman Ahmad	Proposal/Price Quote
United Oil & Gas C...	USD 440,000.00	04/15/2012	Nauman Ahmad	External Referral	United Oil Emergen...	Nauman Ahmad	Perception Analysis
United Oil & Gas C...	USD 270,000.00	04/15/2012	Nauman Ahmad	Partner	United Oil Installations	Nauman Ahmad	Negotiation/Review
United Oil & Gas C...	USD 270,000.00	04/15/2012	Nauman Ahmad		United Oil Installations	Nauman Ahmad	Qualification
United Oil & Gas C...	USD 125,000.00	04/15/2012	Nauman Ahmad		United Oil Office Po...	Nauman Ahmad	Perception Analysis
GenePoint	USD 85,000.00	04/15/2012	Nauman Ahmad	Partner	GenePoint Standby...	Nauman Ahmad	Closed Won
Burlington Textiles ...	USD 235,000.00	04/15/2012	Nauman Ahmad	Web	Burlington Textiles ...	Nauman Ahmad	Closed Won
United Oil & Gas C...	USD 235,000.00	04/15/2012	Nauman Ahmad	External Referral	United Oil Installations	Nauman Ahmad	Closed Won
United Oil & Gas C...	USD 675,000.00	04/15/2012	Nauman Ahmad		United Oil Plant Sta...	Nauman Ahmad	Prospecting
Page 1 of 2 Displaying objects 1 - 20 of 34 20 Items per page							

Features Description- Pagination



- Has been designed with the intention to provide maximum flexibility and fully customizable table for the user.
- Add/delete a record on the same page by clicking the add button.
- Some pagination features, magnified:

The screenshot displays the 'Opportunities' table interface. At the top, there are tabs for 'Opportunities' and 'Opportunity Pipeline', and an 'Add' button. The table has columns for 'Account Name', 'Amount', and 'Close Date'. A magnified callout (yellow arrow) points to the 'Add' button. Another magnified callout (green arrow) points to the 'Add' button in the table's header. A third magnified callout (red arrow) points to the 'Clear Filter Data' button. A fourth magnified callout (blue arrow) points to the 'Items per page' dropdown menu, which is currently set to 20. At the bottom, a pagination bar shows 'Page 1 of 5' and a '20 Items per page' dropdown.

Account Name	Amount	Close Date
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014
Opportunity Name	\$1,000.00	12/31/2014

Features Description- Columns



User has the ability to select what columns need to be displayed...

... By merely checking the boxes.

Id-level filtering options are available for each column. To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

able click on the particular Opportunity record to edit it.

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any queries / suggestions, please contact us at "oppmanna@algoworks.com"

ortunities | **Opportunity Pipeline**

Id

Account Name	Amount	Close Date
	USD 0.00	
	USD 0.00	
	USD 0.00	
Communicati...	USD 60,000.00	
I Hotels & Re...	USD 15,000.00	
I Hotels & Re...	USD 90,000.00	
ss Logistics a...	USD 80,000.00	
ss Logistics a...	USD 120,000.00	04/15/2012
ss Logistics a...	USD 220,000.00	04/15/2012
rsity of Arizona	USD 100,000.00	04/15/2012
rsity of Arizona	USD 50,000.00	04/15/2012
rsity of Arizona	USD 90,000.00	04/15/2012
I Oil & Gas C...	USD 440,000.00	04/15/2012
I Oil & Gas C...	USD 270,000.00	04/15/2012

Columns

- ☒ Account Name
- ☒ Amount
- ☒ Close Date
- ☒ CreatedBy Name
- ☒ Lead Source
- ☒ Name
- ☒ Owner Name
- ☒ Stage
- ☐ Closed
- ☐ Fiscal Quarter
- ☐ Fiscal Period
- ☐ Expected Amount
- ☐ Next Step
- ☐ Has Line Item
- ☐ Opportunity Type
- ☐ Last Activity

Filters

Source | Name

Source	Name
	test2
	test1
	All
of mouth	Edge SLA
	Grand Hotels Kitchen
al Referral	Grand Hotels SLA
al Referral	Express Logistics
al Referral	Express Logistics
Show	Express Logistics
ree Referral	University of AZ In
Relations	University of AZ Po
Relations	University of AZ Sl
al Referral	United Oil Emergen
	United Oil Installa

Features Description- Filters 1/7



- Each column has the sorting capabilities for its values in ascending or descending format.
- Filters can also be applied for each field to display records matching a certain number of criterion.

Filter symbol appears as visible in the next slide.

CreatedBy Name	Amount	Name	Account Name
Opportunity Manager	\$345.00		Dickenson
Opportunity Manager	\$700.00		Edge Comr
Opportunity Manager	\$400.00		Edge Comr
Opportunity Manager	\$600.00		Express Lo
Opportunity Manager	\$80,000.00		Edge Comr
Opportunity Manager	\$500.00		Edge Comr
Opportunity Manager	\$700.00	McDonalds inc.	GenePoint
Opportunity Manager	\$1,000.00	Algoworks Pvt.	sForce
Opportunity Manager	\$300.00	Reliance India	Pyramid Co
Opportunity Manager	\$200.00	Fine Grains	sForce

Features Description- Filters 2/7



Let's take an example:

Sample Task: *Filter all the opportunities which has amount greater 70000?*

Steps:

1. Go to the **amount** filter,
2. Select ">" field.
3. Type "70000"
4. As soon as you are done with typing, the grid will automatically be refreshed, and filtered data will be shown in the list.

Features Description- Filters 3/7



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Opportunities | Opportunity Pipeline

 Add

Name	Amount	Close Date	CreatedBy Name	Lead Source	Owner Name	Stage
Test1201	USD 850,001.00		Opportunity Manager			Closed Won
Test1248	USD 85,000.00		Opportunity Manager			Closed Won
Test1246	USD 85,000.00		Opportunity Manager			Closed Won
Test1243	USD 85,000.00		Opportunity Manager			Closed Won
Test1241	USD 85,000.00					Closed Won
Test1240	USD 85,000.00	03/24/2014				Closed Won
Test1236	USD 85,000.00	03/20/2014				Closed Won
Test1234	USD 210,000.00	03/18/2014				Closed Won
Test1233	USD 85,000.00	03/17/2014				Closed Won
Test1231	USD 85,000.00	03/15/2014	Opportunity Manager			Closed Won
Test1230	USD 85,000.00	03/14/2014	Opportunity Manager			Closed Won
Test1228	USD 85,000.00	03/12/2014	Opportunity Manager			Closed Won
Test1226	USD 85,000.00	03/10/2014	Opportunity Manager			Closed Won
Test1225	USD 85,000.00	03/09/2014	Opportunity Manager			Closed Won

Context menu for 'Close Date' column:

- Sort Ascending
- Sort Descending
- Columns
- ☒ Filters

Filter dialog for 'Close Date' (numeric type):

- < Enter Number...
- > 70000
- = Enter Number...

So the filter works based on the data type of the column. If the data type is numeric, it will show you "=", "<", ">" options so you may search for equal to, less than and greater than amount respectively.

Features Description- Filters 4/7



In case of text fields, you have option to select “Is equal to” or “starts with” or “contains” etc

Firstly, type the text which you want to search.

For example, if you want to search all accounts for which the name starts with “Global”,

- select “Starts with” in the drop down in the filter, and
- type “Global” and
- click “Filter” to filter the data accordingly.

Features Description- Filters 5/7



Field-level filtering options are available for each column.

To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

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Opportunities						
Opportunity Pipeline						
Add						
Name	Amount	Close Date	CreatedBy Name	Lead Source	Owner Name	Stage
TEST 1	Sort Ascending	07/02/2014	Opportunity Manager	Phone Inquiry		Confirmed
TEST 1	Sort Descending	07/02/2014	Opportunity Manager			Confirmed
Test1201		02/13/2014	Opportunity Manager			Closed Won
Test1254	Columns	04/07/2014	Opportunity Manager	Web		Closed Won
Test1249	Filters		unity Manager	Purchased List		Proposition
Test1248	USD 85,000.00		unity Manager			Closed Won
Test1246	USD 85,000.00		unity Manager			Closed Won
Test1243	USD 85,000.00		unity Manager			Closed Won
Test1241	USD 85,000.00		unity Manager			Closed Won
Test1240	USD 85,000.00		unity Manager			Closed Won
Test1236	USD 85,000.00		unity Manager			Closed Won
Test1234	USD 210,000.00	03/18/2014	Opportunity Manager			Closed Won
Test1233	USD 85,000.00	03/17/2014	Opportunity Manager			Closed Won
Test1231	USD 85,000.00	03/15/2014	Opportunity Manager			Closed Won
Test1230	USD 85,000.00	03/14/2014	Opportunity Manager			Closed Won

Features Description- Filters 6/7



In case of Date field, for example “Close Date”, you have option of “Before”, “After” and “On”, and you may select a date based on that to filter the data accordingly.

For example,

- select Date , 5th October 2014, in the drop down in the filter, and
- select “After ” and
- click “Filter” to filter the data accordingly.
- This will show all opportunities record after 5th October 2014 up till now.

Field-level filtering options are available for each column.
To access filters, **hover over the field name and click on the down arrow**, then select the desired filters.

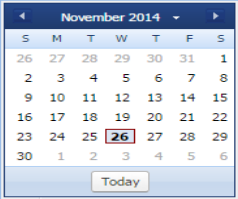
Double click on the particular Opportunity record to edit it.

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Opportunities		Opportunity Pipeline				
Name	Amount	Close Date	CreatedBy Name	Lead Source	Owner Name	Stage
Test1	USD 0.00	07/02/2014	Sort Ascending	Phone Inquiry		Confirmed
Test1	USD 0.00	07/02/2014	Sort Descending			Confirmed
Test1201	USD 850,001.00	02/13/2014	Columns	Web		Closed Won
Test1254	USD 0.00	04/07/2014	Filters			Closed Won
Test1249	USD 0.00	03/05/2014	After			
Test1248	USD 85,000.00	04/01/2014	Before			
Test1246	USD 85,000.00	03/30/2014	On			
Test1243	USD 85,000.00	03/27/2014				
Test1241	USD 85,000.00	03/25/2014				
Test1240	USD 85,000.00	03/24/2014				
Test1236	USD 85,000.00	03/20/2014				
Test1234	USD 210,000.00	03/18/2014				
Test1233	USD 85,000.00	03/17/2014				
Test1231	USD 85,000.00	03/15/2014				Closed Won
Test1230	USD 85,000.00	03/14/2014				Closed Won



Features Description- Filters 7/7



In case of Drop downs such as “Stage”, you will have the drop down values displayed with check boxes on the left, so you may select one or more for which you want to apply a filter on the data available in the grid.

Field-level filtering options are available for each column.
To access filters, **hover over the field name and click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

To know more about Algoworks, please visit "www.algoworks.com/crm".

For any queries / suggestions, please contact us at "opmanager@algoworks.com".

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Opportunities | **Opportunity Pipeline**

 Add

Name	Amount	Close Date	Stage	CreatedBy Name	Lead Source	Owner Name
TEST 1	USD 0.00	07/02/2014	Confirmed	Sort Ascending	Phone Inquiry	
TEST 1	USD 0.00	07/02/2014	Confirmed	Sort Descending		
Test1201	USD 850,001.00	02/13/2014	Closed Won	Columns		
Test1254	USD 0.00	04/07/2014	Closed Won	Filters	☐ Needs Discovery	
Test1242	USD 0.00	03/05/2014	Proposition		☐ Proposition	
Test1248	USD 85,000.00	04/01/2014	Closed Won	Opportunity Manager	☐ Negotiation	
Test1246	USD 85,000.00	03/30/2014	Closed Won	Opportunity Manager	☐ Execution & Close	
Test1243	USD 85,000.00	03/27/2014	Closed Won	Opportunity Manager	☐ Closed Won	
Test1241	USD 85,000.00	03/25/2014	Closed Won	Opportunity Manager	☐ Closed Lost	
Test1240	USD 85,000.00	03/24/2014	Closed Won	Opportunity Manager	☐ Confirmed	
Test1236	USD 85,000.00	03/20/2014	Closed Won	Opportunity Manager	☐ In Forecast	
Test1234	USD 210,000.00	03/18/2014	Closed Won	Opportunity Manager	☐ Suspected	
Test1233	USD 85,000.00	03/17/2014	Closed Won	Opportunity Manager	☐ Unqualified Opportunity	
Test1231	USD 85,000.00	03/15/2014	Closed Won	Opportunity Manager	☐ Qualified Opportunity	
Test1230	USD 85,000.00	03/14/2014	Closed Won	Opportunity Manager		

Features Description- Pipeline View



- The opportunities can also be viewed in the pipeline view by clicking on *'Opportunity Pipeline'* from the top bar.

Opportunities

Opportunity Pipeline

Add

Account Name	Amount	Close Date	CreatedBy Name	Lead Source	Name
	USD 0.00	10/29/2014	Nauman Ahmad		test2
	USD 0.00	10/29/2014	Nauman Ahmad		test1
	USD 0.00	07/02/2014	Nauman Ahmad		All
Edge Communicati...	USD 60,000.00	04/15/2012	Nauman Ahmad	Word of mouth	Edge SLA
Grand Hotels & Re...	USD 15,000.00	04/15/2012	Nauman Ahmad		Grand Hotels Kitch...
Grand Hotels & Re...	USD 90,000.00	04/15/2012	Nauman Ahmad	External Referral	Grand Hotels SLA

- The leads and their relevant details are provided having them categorized in what STAGE they are in currently. Highlights:

Features Description- Pipeline View



HIGHLIGHTS:

- Best view for managing opportunities gathering most information in a single view
- Compact, Efficient and very responsive implementation

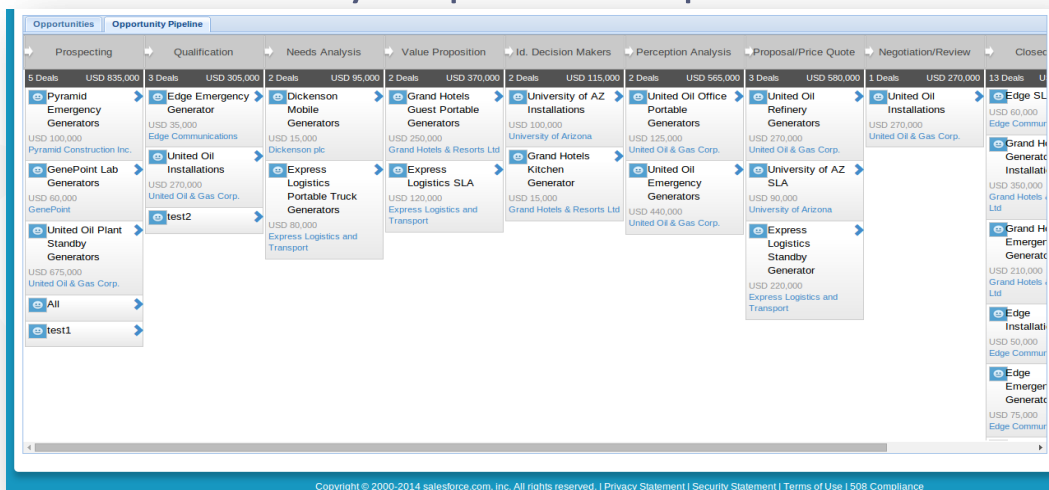
Prospecting		Qualification		Needs Analysis		Value Proposition		Id. Decision Makers		Perception Analysis		Proposal/Price Quote		Negotiation/Review		Demo Requested	
1 Deals	\$0.00	8 Deals	\$1,524.00	10 Deals	\$114,253.00	1 Deals	\$250,000.00	0 Deals	\$0.00	1 Deals	\$100,000.00	0 Deals	\$0.00	0 Deals	\$0.00	1 Deals	\$400.00
New Record Test Dickenson plc		new opp1 Burlington Textiles Corp of America		test oppp11111 dsfdfs				Grand Hotels Guest Portable Generators		Sample Opp \$100,000.00 United Oil & Gas Corp.						Balaji Pvt Ltd. \$400.00 Edge Communications	
		sdffsds		EBay Corp1 \$1,000.00 Edge Communications		\$250,000.00 Grand Hotels & Resorts Ltd											
		vordtgr		Test \$654.00 Burlington Textiles Corp of America				plyush test									
		Ajey Test \$1,000.00 Burlington Textiles Corp of America		Test Opp Burlington Textiles Corp of America													
		test 1234 \$100.00 Burlington Textiles Corp of America		test													
		test12345 \$124.00		Dickenson plc													

Features Description- Pipeline View



HIGHLIGHTS:

- Best view for managing opportunities gathering most information in a single view
- Compact, Efficient and very responsive implementation

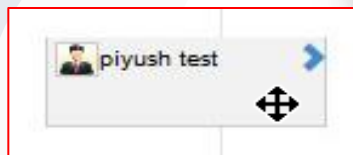
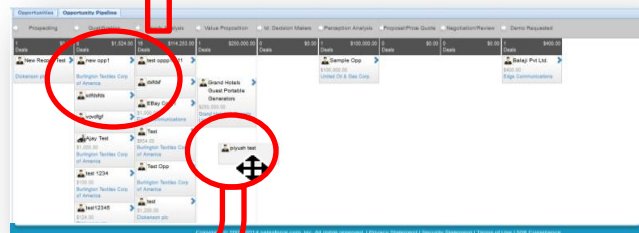


Features Description- Pipeline View



- The top black bar summarizes the total deals and total values of all deals that are in that particular stage.

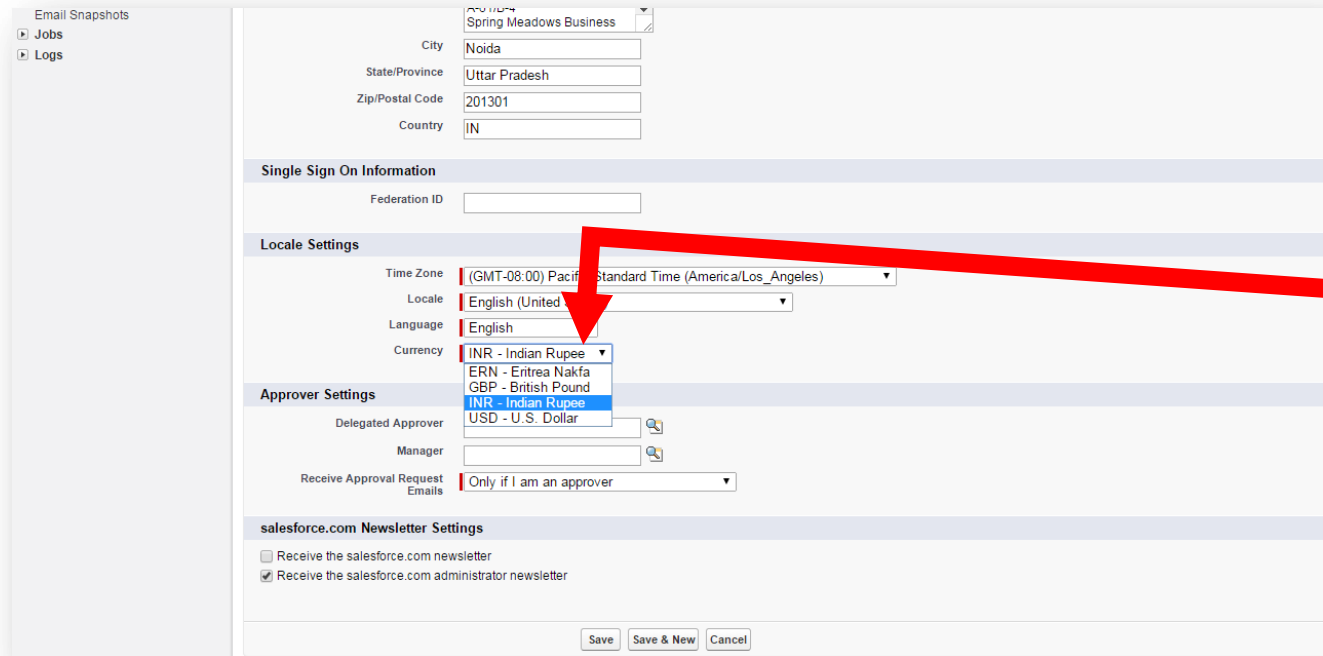
Qualification	Needs Analysis	V
8 Deals \$1,524.00	16 Deals \$114,253.00	1 Deal
new opp1	test oppp11111	
Burlington Textiles Corp of America	dsfdsf	
sdfdsfs	EBay Corp1	
vovdfgf	\$1,000.00 Edge Communications	\$250 Gran Ltd



- Drag-and-Drop any Opportunity from one stage to another to change its stage

Features Description- MultiCurrency

- Currency can be set from Locale Settings



Email Snapshots

- Jobs
- Logs

City: Noida

State/Province: Uttar Pradesh

Zip/Postal Code: 201301

Country: IN

Single Sign On Information

Federation ID:

Locale Settings

Time Zone: (GMT-08:00) Pacific Standard Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Currency: **INR - Indian Rupee**

Appraiser Settings

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

salesforce.com Newsletter Settings

☐ Receive the salesforce.com newsletter

☒ Receive the salesforce.com administrator newsletter

Save Save & New Cancel

Features Description- MultiCurrency

Pipeline view with multi-currency shown.

Field-level filtering options are available for each column.
To access filters, **hover over the field name and click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

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For any queries / suggestions, please contact us at "oppmanger@algoworks.com".

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All Count Stage
Pie chart showing All based on Count And Stage

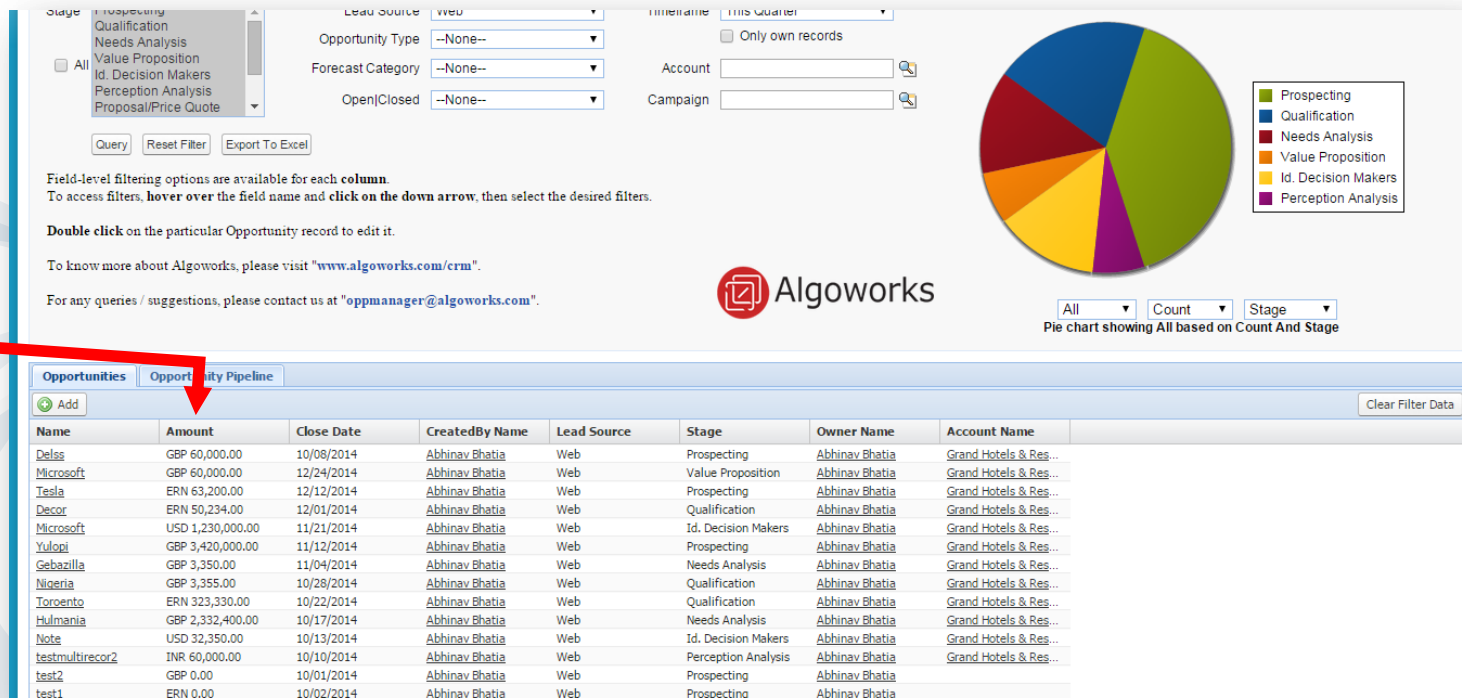
Opportunities | Opportunity Pipeline

Prospecting	Qualification	Needs Analysis	Value Proposition	Id. Decision Makers	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Closed Won
6 Deals USD 2,661,046	3 Deals USD 380,986	2 Deals USD 1,743,087	1 Deals USD 44,776	2 Deals USD 1,262,350	1 Deals USD 991	0 Deals USD 0	0 Deals USD 0	0 Deals USD 0
test0	Toronto ERN 323,330 Grand Hotels & Resorts Ltd	Hulmania GBP 2,332,400 Grand Hotels & Resorts Ltd	Microsoft GBP 60,000 Grand Hotels & Resorts Ltd	Note USD 32,350 Grand Hotels & Resorts Ltd	testmultires INR 60,000 Grand Hotels & Resorts Ltd			
test1								
test2	Nigeria GBP 3,355 Grand Hotels & Resorts Ltd	Gebazilla GBP 3,350 Grand Hotels & Resorts Ltd		Microsoft USD 1,230,000 Grand Hotels & Resorts Ltd				
Delss GBP 60,000 Grand Hotels & Resorts Ltd	Decor ERN 50,234 Grand Hotels & Resorts Ltd							
Yulopi GBP 3,420,000 Grand Hotels & Resorts Ltd								
Tesla ERN 63,200 Grand Hotels & Resorts Ltd								

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Features Description- MultiCurrency

The set currencies can be observed in the view as shown



THANK YOU

Fall in love with the lovely app!

For any queries regarding installation, please send a mail to oppmanager@algoworks.com



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