

Opportunity Load Module

The following documents the **Opportunity Load Module** which allows the user to import and add individual opportunities to existing records.

It is important the existing have some unique key which can be used to match against the existing records such as the Unique ID field.

[NOTE: This feature must be enabled by LeadMaster personnel by individual logon id]

Add New Records Screen

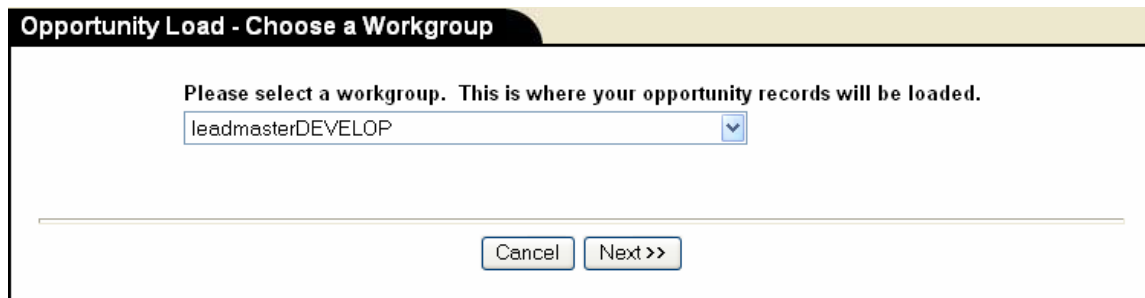
If this feature is enabled the user will see the following selections in the **Add New Records** Screen:

- **Opportunity Load Wizard**
- **Opportunity Load Logs**
- **Opportunity Load Templates**

The Opportunity Load Module works very similar to the regular import load process.

Opportunity Load Wizard

User is asked which workgroup the opportunities are going to be loaded to:



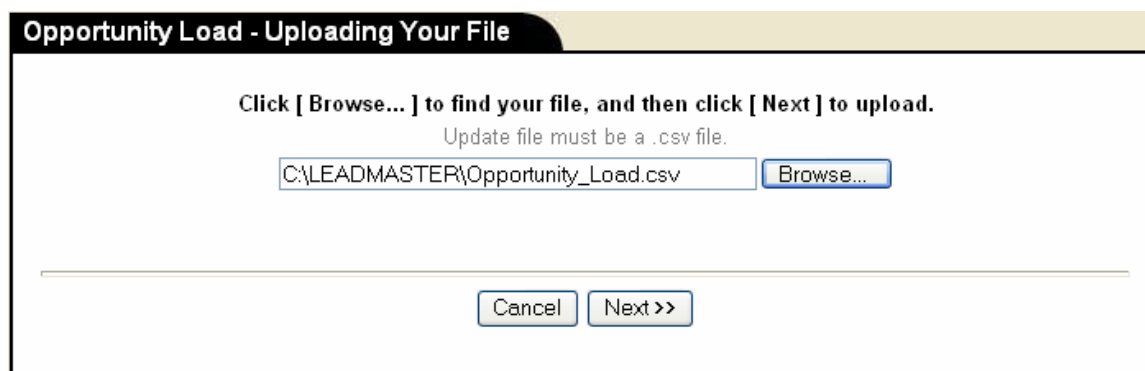
Opportunity Load - Choose a Workgroup

Please select a workgroup. This is where your opportunity records will be loaded.

leadmasterDEVELOP

Cancel Next >>

Then the user is asked to locate the opportunity import file:



Opportunity Load - Uploading Your File

Click [Browse...] to find your file, and then click [Next] to upload.

Update file must be a .csv file.

C:\LEADMASTER\Opportunity_Load.csv Browse...

Cancel Next >>

Then the user is asked whether they want to use an existing opportunity load template or create a new one:

Opportunity Load - Templates

Please choose from an existing or create a new load template.

File Verification

Number of records on update file: 2 (including header)

The number shown above should match the number of records in your file. If not, Cancel and review your file.

Update Template New Template

Then the user is asked how they want to map the opportunity import file to the opportunity fields (including one product):

Opportunity Load - Match Fields

Please match up your file fields to Opportunity fields. When finished select NEXT.

File Fields	Opportunity Fields	
<div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> Sales Status WinProb Source CustomText Custom1 Custom3 ForecastDate CloseDate SalesStage CloseReason Custom2 Custom4 Product Price QTY </div>	<div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> Win Probability Opportunity Source Close Date Sales Stage Close Reason Custom Text Custom 1 Custom 2 Custom 3 Custom 4 Notes <li style="background-color: #f0f0f0;">Product Data Product Name UnitPrice Quantity </div>	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>
		<div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p>Match Fields</p> <ul style="list-style-type: none"> WinProb - Win Probability Source - Opportunity Source CustomText - Custom Text Custom1 - Custom 1 Custom3 - Custom 3 ForecastDate - Forecast Date CloseDate - Close Date SalesStage - Sales Stage CloseReason - Close Reason Custom2 - Custom 2 Custom4 - Custom 4 Product - Product Name Price - UnitPrice QTY - Quantity Notes - Notes </div>

Note that the following about the import fields:

- Values in pull-down fields must match values in table
- Forecast Date and Close Date must be valid dates (mm/dd/yy)
- Probability values must be imported in decimal form (such as .25 for 25%)
- Product Unit Price and Quantity must be numeric

Then the user is asked what the key field(s) are in order to match:

Opportunity Load - Match Key Fields

Please match up your file fields to key field(s). When finished select NEXT.

File Fields	Key Fields	Matched Key Fields
UniqueID	Address 2	UniqueID - Unique ID
OppName	Address 3	
Description	City	
Sales Status	State	
WinProb	Zip	
Source	Country	
CustomText	Web Address	
Custom1	SIC Code	
Custom3	# Emp.	
ForecastDate	Company Revenue	
CloseDate	Ultimate Duns	
SalesStage	Site Duns	
CloseReason	Lead Source	
Custom2	Unique ID	
Custom4	Contacted Date	

The user can choose other field(s) for the key but the key needs to be unique so that the opportunity load knows what record to match against.

On the last screen the user has the ability to **Save** the Opportunity Template for future use (user's should always save their template in case there is any problem so we can tell what was mapped).

Opportunity Load - Summary

Ready to update. Before proceeding, click Save to store this template for future loads using this format. Choose Save As to save this template under a new name.

File: f127200493342_Opportunity_Load.csv

Template: New Template

Database: leadmasterDEVELOP

No. of Records: 1

Key(s) to Match: User_Field_23

Opportunity Load Logs

After clicking on **Finish** the actual Opportunity Load will take place. After the load is completed, the Opportunity Load Log will be displayed showing the this load (and others that have taken place in the past to this workgroup).

Opportunity Load Log				
Workgroup: leadmasterDEVELOP				
Date File Ran	File Name	Updated By	Number of Records in File	Number of Records Updated
12/7/2004 9:47:09 AM	Opportunity_Load.csv	Richard Dyer	1	1
12/7/2004 8:18:55 AM	Opportunity_Load.csv	Richard Dyer	1	1

This screen can also be accessed via the **Add New Records** screen and **Opportunity Load Logs** function.

NOTE: THERE IS NO WAY OF BACKING OUT OPPORTUNITIES THAT HAVE BEEN LOADED VIA THIS METHOD. USER'S SHOULD DO A TEST LOAD OF A SINGLE RECORD BEFORE LOADING AN ENTIRE FILE OF OPPORTUNITIES.

Opportunity Load Templates

This function can be accessed via the **Add New Records** screen and **Opportunity Load Templates** function.

Update Templates			
Workgroup: leadmasterDEVELOP			
Template	Workgroup Assigned	Is Public	
Arrow Opportunities Load	leadmasterDEVELOP	No	edit delete
Opportunity Load Example	leadmasterDEVELOP	No	edit delete
Opportunity Test	leadmasterDEVELOP	Yes	edit delete

The **Opportunity Load Templates** can be made **Public** via this screen.