

Corporate Opportunities Field Definitions

- I. **Opportunity Name**
 - a. Please provide a name for the opportunity. Ensure it is relevant and descriptive to help both you and management easily identify it.

- II. **Close Date**
 - a. Enter the expected closing date for the opportunity. This can be updated later as needed throughout the opportunity process.

- III. **Type**
 - a. Line Review: Proposal for new business with the customer or existing program. Use 'Line Review' as the type for any potential at-risk volume.
 - b. Promotion: Ads / in and out opportunities.
 - c. Show Deal: Show offerings.
 - d. New Items

- IV. **Rollout Date**
 - a. This field tracks the date of key events related to opportunities, such as line review launches, ad shipments, or show deal deliveries. It provides clear visibility when these events are scheduled, enabling teams to coordinate effectively and meet critical deadlines.

- V. **Account Name**
 - a. Enter the **customer-manufacturer record** that this opportunity is related to. It is crucial to choose the correct customer-manufacturer record, as it ties to backend formulas. **Do not select a store record or a manufacturer record.** By associating the opportunity with the customer-manufacturer record, we can accurately track both the customer, and the manufacturer involved.

- VI. **Manufacturer**
 - a. Selecting from the dropdown the manufacturer this opportunity is related to.

- VII. **Stages**
 - a. 05 – Approach
 - b. 25 – Interview
 - c. 50 – Demonstrate
 - d. 75 – Negotiate

- VIII. **Amount:** **Annual amount** of sales dollars.

Click [here](#) to view a step-by-step on how to create an opportunity