

# USING ASG RECURRENT OPPORTUNITY

ADD-ON FOR DYNAMICS CRM 2011, CRM 2013, CRM 2015, CRM ONLINE

## WHAT IS ASG RECURRENT OPPORTUNITY?

Imagine you have customers purchasing your services on a monthly subscription model. Do you consider future subscriptions as already won opportunities or as almost won ones? How would you include this in your CRM: as a one-time deal for the next 12 months or as a monthly deal for the next 3 years? How much time would it take you to enter 12 opportunities for the same customer? But what if you had 10 customers with 12 monthly opportunities?

With ASG Recurrent Opportunity you can create repeated opportunities based on a recurrence pattern of your choice, just like a Microsoft Outlook recurrent meeting.

Your company and your sales team will gain important insights and save valuable time by using this Dynamics CRM Add-on. Here are the main benefits:

- have a more accurate pipeline
- save time with the repeated monthly opportunities
- create your personalized recurrence pattern: daily, weekly, monthly, quarterly, yearly. You name it!
- better forecasted run-rate
- create workflows to invoice each opportunity, after it has been won and not before



## BUSINESS SCENARIOS:

- subscription paid services: phone companies, paid TV, internet providers, software license providers
- quarterly newspaper subscriptions
- yearly support contracts
- library subscription

To start using the add-on, go to SALES -> NEW OPPORTUNITY and fill in the new opportunity details.

The screenshot shows the Microsoft Dynamics CRM interface for creating a new opportunity. The browser address bar shows the URL: <https://asgcrm10.crm4.dynamics.com/main.aspx?Origin=Portal&>. The page title is "New Opportunity". The status is "In Progress" and the owner is "Nicu Aleman ASG". The estimated close date is 5/26/2015 and the estimated revenue is €520.00. The opportunity is currently in the "Qualify (Active)" stage. The summary section shows the topic as "Great Recurrent Opportunity" and the account as "Fabrikam, Inc. (sample)".

Click on SAVE, to save the information on the newly created opportunity. Until you SAVE, you will not be able to see the RECURRENCE PATTERN button. In Dynamics CRM 2011, the RECURRENTE PATTERN button is visible, but inactive. It will become active after saving the opportunity.

This screenshot shows the same "New Opportunity" form, but with the "SAVE" button highlighted with a red box. The "Topic" field now displays "Great Recurrent Opportunity". The "Qualify (Active)" stage is still selected. The summary section shows the topic as "Great Recurrent Opportunity" and the account as "Fabrikam, Inc. (sample)".

On the Opportunity Ribbon you will notice the RECURRENCE PATTERN button.

The screenshot shows the Microsoft Dynamics CRM interface for an Opportunity. The ribbon includes buttons for '+ NEW', 'CLOSE AS WON', 'CLOSE AS LOST', 'RECALCULATE OPPORTUN...', 'RECURRENCE PATTERN' (highlighted with a red box), 'ASSIGN', and 'EMAIL A LINK'. Below the ribbon, the opportunity title is 'Great Recurrent Opportunity'. A progress bar shows stages: 'Qualify (Active)', 'Develop', and 'Propose'. Under 'Qualify (Active)', there are tasks: 'Identify Contact' (click to enter), 'Identify Account' (checked, Fabrikam, Inc. (sample), click to enter), and 'Purchase Timeframe' (click to enter). Under 'Develop', there are tasks: 'Estimated Budget' (click to enter), 'Purchase Process' (click to enter), and 'Identify Decision Maker' (mark complete). Under 'Propose', there is a task: 'Capture Summary' (click to enter). Below the progress bar is a 'Summary' section with fields for 'Topic' (Great Recurrent Opportunity), 'Contact', 'Account' (Fabrikam, Inc. (sample)), and 'Purchase Timeframe'. To the right of the summary are tabs for 'POSTS', 'ACTIVITIES', and 'NOTES', with a 'POST' button and radio buttons for 'Both', 'Auto posts', and 'User posts'.

The recurrence page will open and you can choose your preferred pattern. For example, you can choose the 2<sup>nd</sup> day of every 2 months and end the pattern in by the end of 1<sup>st</sup> of January 2017. You can enter the number of occurrences that you want to opportunity to be created. This also gives you an indication of how many opportunities will be created by the add-on.

The screenshot shows the 'New Recurrence Pattern for Opportunity' page. The browser address bar shows the URL: https://asgcrm10.crm4.dynamics.com/main.aspx?Origin=Portal&. The ribbon includes buttons for 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The page title is 'New Recurrence Pattern for Opportunity'. Below the title are sections for 'General' and 'Recurrence'. Under 'Recurrence', there are two main sections: 'Recurrence Pattern' and 'Range of Recurrence'. The 'Recurrence Pattern' section has a dropdown menu with options: 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Range of Recurrence' section has fields for 'Start' (5/26/2015), 'End after (X) occurrences' (--), 'or', and 'End by' (--).

All the newly created opportunities will have in the TOPIC name the day, month and the year when the recurrence will take place.

After choosing you pattern, please SAVE & CLOSE it and go back to editing the opportunity.

Microsoft Dynamics CRM | SALES | Opportunities | New Recurrence Pat...

SAVE **SAVE & CLOSE** + NEW FORM EDITOR

RECURRENCE PATTERN FOR OPPORTUNITY : INFORMATION

## New Recurrence Pattern for Opportunity

**General**

**Recurrence**

**Recurrence Pattern**

Recurrence Pattern: Monthly

Day: 1

of every (X) month(s): 1

**Range of Recurrence**

Start	5/26/2015
End after (X) occurrences	12
or	
End by	--

The newly created opportunities will look like in the following screenshot.

### ➔ My Open Opportunities ▾

Topic ↑	Est. Close Date	Est. Revenue	Contact	Account	Probability	Rating
6 orders of Product SKU JJ202 (sample)	5/24/2015	€10,000.00	Maria Campbell...	Fabrikam, Inc. (s...	90	Hot
Great Recurrent Opportunity	5/26/2015	€520.00		Fabrikam, Inc. (s...		Warm
Great Recurrent Opportunity 01/01/2016	1/1/2016	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 02/01/2016	2/1/2016	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 03/01/2016	3/1/2016	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 04/01/2016	4/1/2016	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 05/01/2016	5/1/2016	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 06/01/2015	6/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 07/01/2015	7/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 08/01/2015	8/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 09/01/2015	9/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 10/01/2015	10/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 11/01/2015	11/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Great Recurrent Opportunity 12/01/2015	12/1/2015	€520.00		Fabrikam, Inc. (s...	0	Warm
Needs to restock their supply of Product SKU AX305; will...	7/22/2015	€25,000.00	Sidney Higa (sa...	Blue Yonder Airli...		Hot
They sell many of the same items that we do - need to fol...	9/27/2015	€26,000.00	Robert Lyon (sa...	Contoso Pharma...	95	Hot
Very likely will order 18 Product SKU JJ202 this year (sam...	8/24/2015	€30,000.00	Paul Cannon (sa...	Alpine Ski Hous...		Hot
Will be ordering about 110 items of all types (sample)	10/25/2015	€25,000.00	Jim Glynn (samp...	Coho Winery (sa...	80	Hot

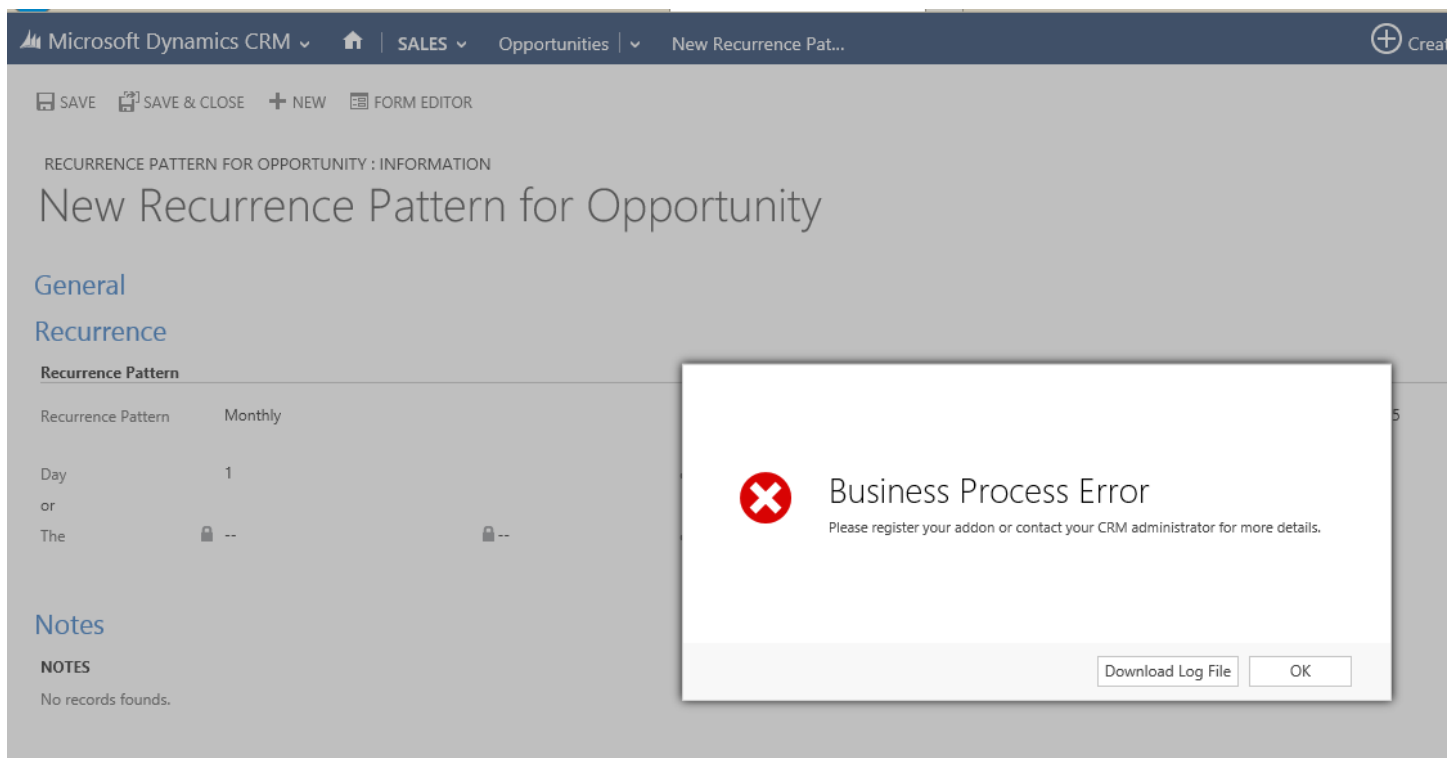
Thank you for your interest in ASG Recurrent Opportunity. Should you have any questions, contact us at +4031 425 38 35 or email us at [support@aleman.ro](mailto:support@aleman.ro). Your trial will expire 30 days from the date of installation. If you want to purchase the add-on, you will be charged 1€/CRM user/month.

## COMMONLY KNOWN ERRORS:

1. You don't see the add-on after saving the opportunity

If your CRM administrator did not give the right security role, you will not see the add-on and the RECURRENCE PATTERN button. Please ask your CRM administrator to provide the access to these functionalities. The information is available in the Installation Guide

2. Action: When trying to use the Add-on without registering it, you receive the following error:



Please contact your CRM administrator and ask him to register the solution, according to the Installation Guide.