Opportunities

CM Opportunities allow you to organize your accounts to stay focused on achieving your end goal.

Give your opportunity a name and assign to a campaign, if you'd like. Complete your start date and end date, end date can be when you are aiming to complete the opportunity (i.e. close the sale). Assign to an account and a contact, add in the optional forecast percentage (how likely are they to complete a sale).

You can customize steps (i.e. tasks) by clicking the staircase icon next to your opportunity in the grid below. Step templates allow you to organize your steps in a task and keep you focused on moving through each step with each account.

If you choose to use a different step template or want to create custom steps for that account, click the staircase icon. Select the template you want to use, or complete the information below to add a new step. Continue adding until all the steps are there that you want for that account. Once you have completed that step, you can either click the checkbox for a simple complete, the green arrow for completed with success (which will alter your forecasted success percentage based on your defined intervals), or the red arrow for completed with failure (again, altering your forecasted success percentage). When the entire opportunity has been completed, click the completed checkbox in the Step window.

Begin by clicking Contact Management in the user menu on the left side of PinPoint, then click Opportunities.

Add Opportunity

1. Click the Add Opportunity button.
2. Enter the Opportunity Name.
3. Select the Account you want the opportunity assigned to.
4. Select the Start Date for the opportunity.
5. Fill in any other information needed for the opportunity, then click Save.