

Opportunity value over time for Creatio

<Setup Guide>



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1. ADD-ON OVERVIEW

1.1 Use case

When inserting a value for the opportunity at a date X, in the dashboards it is only possible to see the signed amount at date X. However, in some situations, the opportunities are contracts whose value is shared over several months or even years.

The add-on adds a functionality to divide the amount of the opportunity value by the duration of the contract (in months).

1.2 What are the new functionalities?

- On the “Opportunity” page
 - A field named “Beginning of the project”
- On the “PRODUCTS” tab in the Opportunity section
 - A field named “Contract duration (Months)”
 - A detail named “Value of products per month”

All the new functionalities (fields, detail, etc.) are added to the “Opportunities” section.

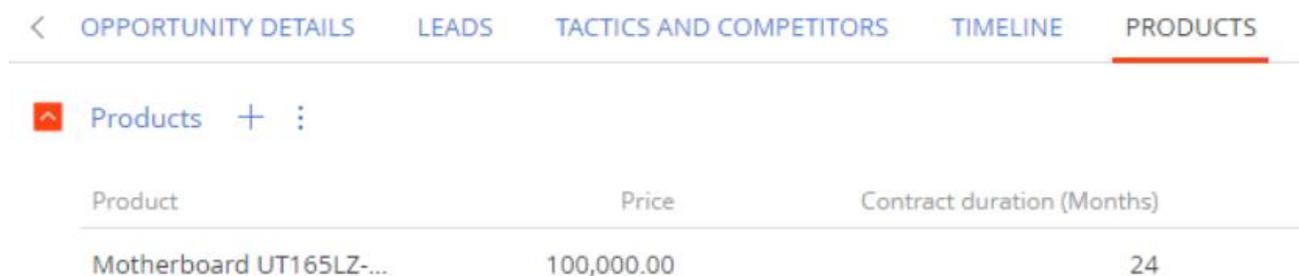
2. SETTINGS

A couple adjustments are necessary to make use of the new functionalities.

2.1 Change the "Columns setup"

To add the Contract duration for a product, you need to do the following steps:

1. Go to the Opportunity section → "PRODUCTS" tab → click on the  to change the column setup
2. Change the columns setup as you wish but remember that the "Contract duration (Months)" and the "Price" of a product became mandatory with the add-on installation.

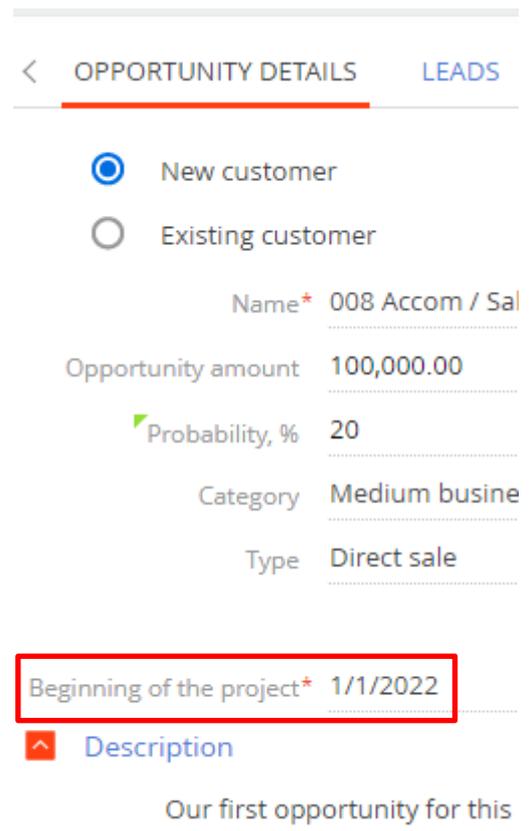


Product	Price	Contract duration (Months)
Motherboard UT165LZ-...	100,000.00	24

2.2 Set the new "Beginning of the project" field

This field is added with the add-on installation.

- The field is mandatory, you can place it where you want on the opportunity page.
- If your company's process would have the "Beginning of the project" that is equal to the "Closed on" date, you can imagine configuring a business rule to make those two fields equivalent at any time.



New customer
 Existing customer

Name* 008 Accom / Sal

Opportunity amount 100,000.00

Probability, % 20

Category Medium busine

Type Direct sale

Beginning of the project* 1/1/2022

 Description

Our first opportunity for this

2.3 Setting up the new detail

The new detail “Value of products per month” is automatically setup in the “PRODUCTS” tab of the “Opportunities” section. However, you can delete it from there if you would only need the dashboards statistics displayed correctly but not having all the lines displayed under the “PRODUCTS” tab.

 Value of products per month ⋮

Opportunity	Product	Product value	Product date ^
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	1/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	2/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	3/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	4/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	5/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	6/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	7/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	8/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	9/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	10/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	11/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	12/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	1/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	2/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	3/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	4/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	5/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	6/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	7/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	8/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	9/1/2023

3. FULL EXAMPLE

< OPPORTUNITY DETAILS LEADS TACTICS AND COMPETITORS TIMELINE **PRODUCTS**

Products + ⋮

Product	Price	Contract duration (Months)
Motherboard UT165LZ-...	100,000.00	24

Value of products per month ⋮

Opportunity	Product	Product value	Product date
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	1/1/2022
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	2/1/2022
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008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	8/1/2023
008 Accom / Sale of Goods (sample)	Motherboard UT165LZ-32P1 (sample)	4,166.67	9/1/2023

< OPPORTUNITY DETAILS **LEADS**

- New customer
- Existing customer

Name* 008 Accom / Sale of Goods

Opportunity amount 100,000.00

Probability, % 20

Category Medium business

Type Direct sale

Beginning of the project* 1/1/2022

Description

Our first opportunity for this

4. DASHBOARD EXAMPLE

4.1 How to drill-down on product data

- The new created object is called “Value of products per month”
 - It contains two main fields: “Product date” and “Product value”

Example (cf. 4.3)

< AFTER

 What to display

Object* Value of products per month

Function* sum

Column* Product value

Chart type* Column

With stacked

Show legend

4.2 Without the add-on



4.3 With the add-on

