



ASG RECURRENT OPPORTUNITY

USER GUIDE

ADD-ON FOR DYNAMICS CRM 2015, DYNAMICS CRM 2016 AND DYNAMICS 365 FOR SALES

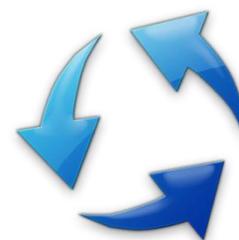
WHAT IS ASG RECURRENT OPPORTUNITY?

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.

Microsoft Dynamics CRM - SALES - Opportunities - New Opportunity

Est. Close Date: 5/26/2015 | Est. Revenue: €520.00 | Status: In Progress | Owner: Nicu Aleman ASG

Qualify (Active) | Develop | Propose | Close | Next Stage

Identify Contact: [click to enter](#)
 Identify Account: [Fabrikam, Inc. \(sample\)](#)
 Purchase Timeframe: [click to enter](#)

Estimated Budget: [click to enter](#)
 Purchase Process: [click to enter](#)
 Identify Decision Maker: [mark complete](#)

Capture Summary: [click to enter](#)

Summary

Topic: **Great Recurrent Opportunity**

Contact:

Account: [Fabrikam, Inc. \(sample\)](#)

Purchase Timeframe: --

Currency: [euro](#)

Budget Amount: --

Purchase Process: --

Description: --

Current Situation: --

POSTS ACTIVITIES NOTES

[Enter post here](#) POST

Both Auto posts User posts

We didn't find any posts.

STAKEHOLDERS

Name ↑	Role
To enable this content, create the record.	

SALES TEAM

Name ↑	Role
To enable this content, create the record.	

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.

Microsoft Dynamics CRM - SALES - Opportunities - New Opportunity

SAVE | SAVE & CLOSE | NEW | EDIT PROCESS | FORM

OPPORTUNITY -

New Opportunity

Qualify (Active)

Identify Contact: [click to enter](#) | Estimated Budget: [click to enter](#)

Identify Account: [Fabrikam, Inc. \(sample\)](#) | Purchase Process: [click to enter](#)

Purchase Timeframe: [click to enter](#) | Identify Decision Maker: [mark complete](#)

Summary

Topic: **Great Recurrent Opportunity**

Contact:

Account: [Fabrikam, Inc. \(sample\)](#)

Purchase Timeframe: --

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

Microsoft Dynamics CRM | SALES | Opportunities | Great Recurrent Op... | **RECURRENCE PATTERN**

OPPORTUNITY

Great Recurrent Opportunity

Qualify (Active) | Develop | Propose

Identify Contact	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Identify Account	Fabrikam, Inc. (sample)	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Summary

Topic: Great Recurrent Opportunity

Contact: []

Account: Fabrikam, Inc. (sample)

Purchase Timeframe: --

POSTS ACTIVITIES NOTES

Enter post here [] POST

Both Auto posts User posts

The recurrence page will open and you can choose your preferred pattern. For example, you can choose the 2nd day of every 2 months and end the pattern in by the end of 1st 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.

https://asgcrm10.crm4.dynamics.com/main.aspx?Origin=Portal8 | Recurrence Pattern for Opp... x

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

SAVE SAVE & CLOSE NEW FORM EDITOR

RECURRENCE PATTERN FOR OPPORTUNITY : INFORMATION

New Recurrence Pattern for Opportunity

General

Recurrence

Recurrence Pattern	Range of Recurrence
Daily	Start 5/26/2015
Weekly	End after (X) occurrences --
Monthly	or
Yearly	End by --

Notes

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

or

The of every (X) month(s) 1

The of every (X) month

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 Free Version. Should you have any questions, contact us at +4031 425 38 35 or email us at support@aleman.ro.

COMMONLY KNOWN ERRORS & LIMITATIONS:

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. The add-on does not copy Pricelists and Opportunity Products. The copied fields are:
 - a. Topic
 - b. Estimated Revenue
 - c. Sales stage
 - d. Account

For the complete solution of the recurrence please contact us at office@aleman.ro or browse our website at www.asgcrm.com