

Changes to "Opportunity" Information in the 11/5/11 BriefingEdge Release

Since most BriefingEdge clients want to track opportunity information from their CRM (e.g. Salesforce, Siebel, Microsoft CRM, home-grown systems...) in BriefingEdge, we have more closely aligned the BriefingEdge screens with that opportunity information. Contact us at CustomerService@BriefingEdge.com if you have questions.

What's new in this release?

- In addition to recording an opportunity id, potential revenue, and expected close date for an opportunity, you can now record the opportunity name and stage/milestone; just let us know if you want those fields added.
- The option to track multiple opportunities per visit can be turned on for your program; just contact us.
- The opportunity id field has moved! (See attached screenshots from our DEMO site, below.)

Visit Information Chicago Briefing Center Site

Visit #: 885 Visit Date: Friday, 11/18/2011 9:00 am - 5:00 pm

Dimension Data

Do not use your Browser's Back, Forward keys. Use the BriefingEdge buttons to navigate through the system.

All fields marked with an asterisk (*) are required.

*Key Customer Contact: Linda Evans

Title: President

Contact's Phone #: []

Contact's Email: []

Website URL: []

Industry: IT Services/Consulting

Country: South Africa

You used to identify the opportunity here on the Customer screen.

Where did it go?
(See the Reason from Briefing screen)

(Your program may call it "Opportunity ID", "SFDC #", "Sales Force Number", "Siebel ID", or something similar.)

Visit Information Chicago Briefing Center Site

Visit #: []

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All fields marked with an asterisk (*) are required.

Is this visit tied to a specific opportunity? Yes No

Opportunity # 2399813

* Revenue Potential \$ 77,000

* Expected Close Date 02/27/2012

* What are your objectives for this briefing? (Please describe specific goals and what is at stake)

Since BriefingEdge can now track multiple opportunities per visit, it was necessary to group all opportunity information together on the same screen.

That required that the Opportunity ID be moved from the Customer screen to the Reason For Briefing screen.