

Really.



synergist

How to

Ops guide

Converting an
Opportunity to Live

Converting an Opportunity to a Live job.

After we complete an opportunity, we need a contract in place before we can make the job *live* in Synergist. When we are ready to convert a job live we can do this by selecting Live from the drop down menu.

The screenshot shows the Synergist interface for an Opportunity titled "Nespresso Data Governance Budget Plan". The "Status" dropdown menu is open, and the "Live" option is highlighted and circled in red. Other visible fields include "Expected" (00/00/00), "Start" (01/07/2023), "Due" (31/08/2023), "Quoted" (£15028.00), "Order no", "VAT" (1 (20%)), "Bill by" (Quote/Estimate), "Sales status" (Open - New), "Pipeline" (- Blank -), "Rating" (- Blank -), "Source" (- Blank -), and "Notes".

We will then get the following message:

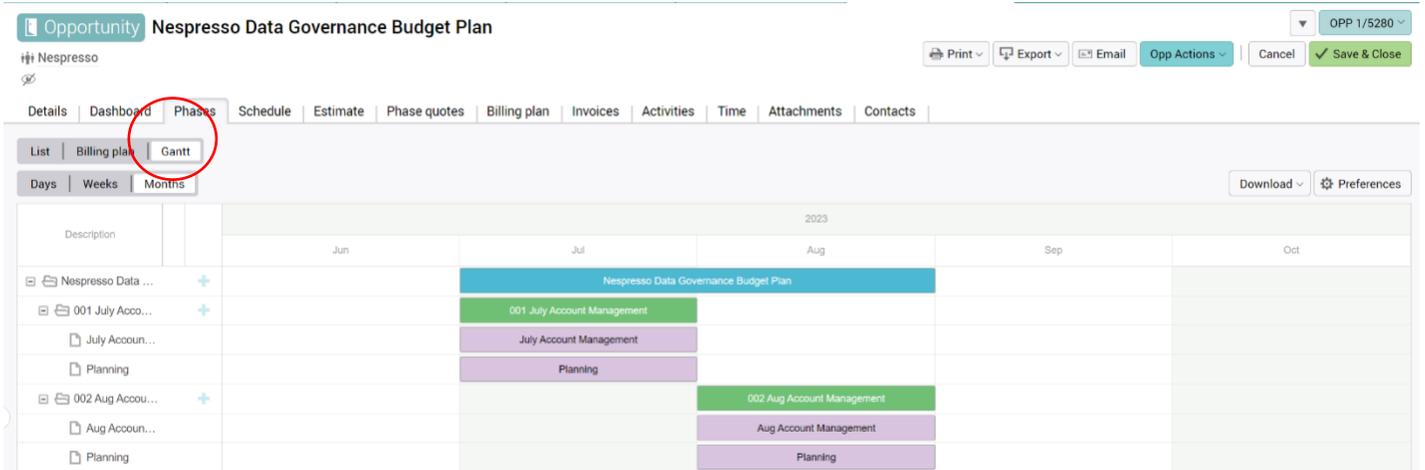
The screenshot shows a warning dialog box titled "Promote this opportunity". The message reads: "Change all the phase statuses & dates to match the job?". There are two buttons: "Change" (with a green checkmark) and "No" (circled in red). At the bottom right, there are "Cancel" and "Promote" buttons.

We select no. This will ensure all the dates we have built in phases stay the same.

You will then type in the PO number that the client will have supplied and click 'Promote'. **It is important to note that a job should not go 'Live' if we have not received a PO.**

All we have left to do is adjust the Gantt chart at phase level so each Phase in the correct month. This will help with the client services capacity reporting.

At job level go to phases, click onto Gantt. We can now move each Phase to make sure it is sat under the correct month.



If you need to move a stage from one month to another, then this would need to be deleted. The job build is now complete, you now can go back to the teams and check their rev rec is sat in the correct month.