Customer Relationship Management

Collaborative Opportunity Management

Administrator Guide

Aurea
Unlimited Possibility

Notices

For details, see the following topics:

- Notices
- Third-party acknowledgments
- Support

Notices

Third-party acknowledgments

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Support

Contact the Aurea Support Portal by opening a support ticket on our website if you encounter any problems with Aurea CRM products that you cannot solve or want to report a potential bug.

Feature requests and consulting services are not part of the services provided by the Support Portal; ideas for new features can be submitted at http://support.aurea.com/, consulting requests is forwarded to the respective department for processing, and is invoiced accordingly.

Support Portal

Email: support@aurea.com

Support Portal: https://support.acrm.aurea.com/hc/en-us

When opening a support ticket, ensure to include the following information:

- A precise description of the problem (including screenshots, log files or other information that helps understand and reproduce the problem).
- Information on the version of Aurea CRM you are using and any patches you have applied, as well as information on any add-ons.
- Information on your Aurea CRM version can be found in the **About** box or in the **System information** (**Patch Info** link). This information is also stored in the respective installation directories in the file `<product>_Patch_History.txt`.

A more detailed description of what information should be provided when opening a support ticket can be found in the Opening a Support Ticket article in the Support Portal.

Table of Contents

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Feature overview

Find the details about Collaborative Opportunity Management.

Collaborative Opportunity Management features:

1. A dedicated style/color-theme for the entire solution

2. Starting collaboration or continuing to collaborate from an ACRM Opportunity, featuring fully automated collaboration space creation, access inheritance, and notification capabilities

3. An Account Management Space

4. A Legal Space

5. An Opportunity-centered collaboration space template, containing a variety of components:

   • Welcome tile

   • Quick-Collaboration buttons

   • Opportunity Overview tile

   • Quick Links tile

   • Categories tile

   • Sales Team tile

   • Recent Activity tile

   • Opportunity (Details) page

   • Collaborators page

6. An Opportunity-centered newspage, containing a set of components:

   • Header, featuring Quick Actions

   • Questions and Answers across the Community

   • Newly created Opportunity spaces

   • Unanswered Questions

   • Most recent/trending activity

2

Using the solution

The solution enables structured collaboration on CRM Opportunities in order to benefit from the organization's expertise and to thus increase the chances of winning an Opportunity, while at the same time accelerating its time for closure.
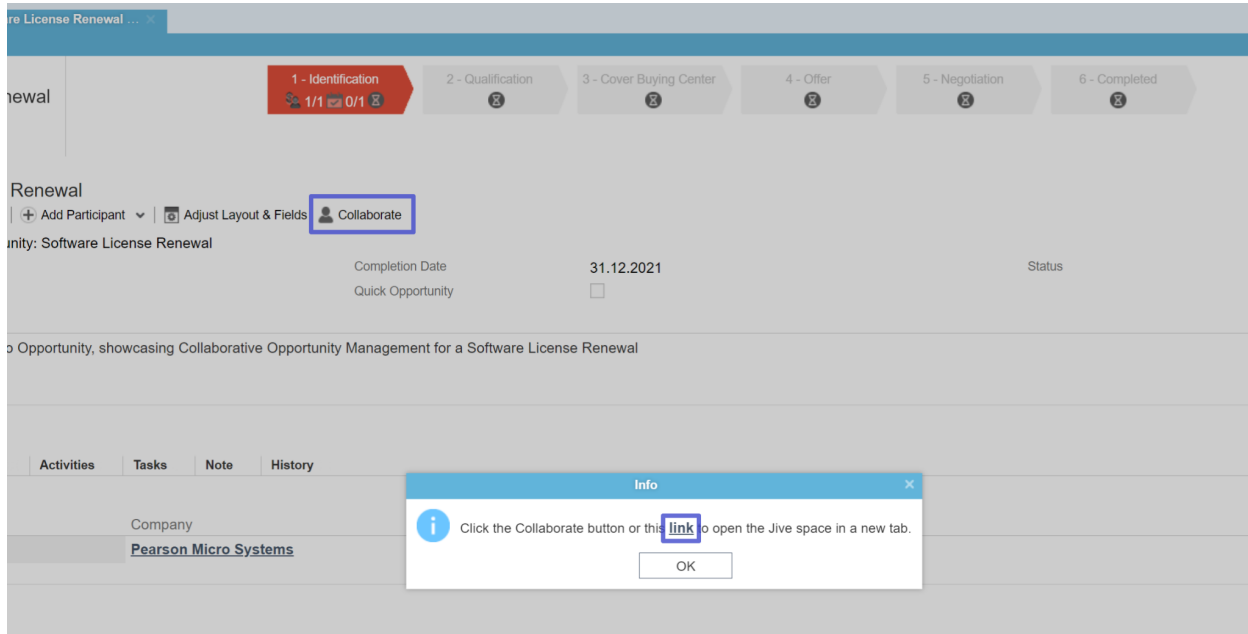
Initiating Collaboration

A "Start Collaboration" button is visible on any ACRM Opportunity's Details mask, as long as that Opportunity is not yet completed and Collaboration hasn't yet been started for it.
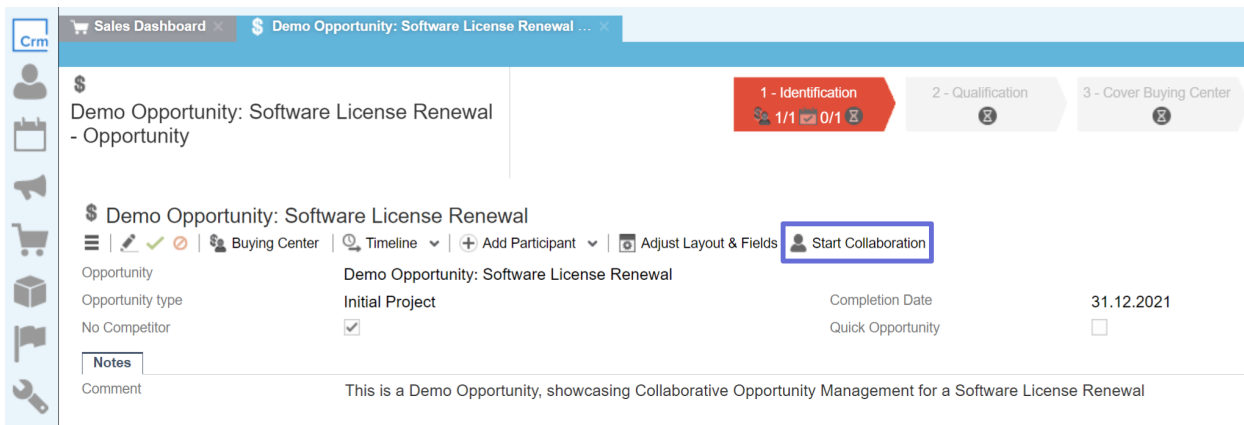
Use this button to initiate collaboration for the selected Opportunity record. The system automatically creates an Opportunity space upon clicking the button, which can take several seconds.

Note: The action can fail if there's already another Opportunity with the same name in the system, for which Collaboration has been started.

Navigate to the Opportunity Collaboration space by either following the directions within the pop-up, or by using the "Collaborate" button.

Collaborating

When navigating to an Opportunity, which already has an Opportunity Collaboration Space, the "Collaborate" button is shown. Use this button to navigate to the Opportunity Collaboration Space within a new browser tab.
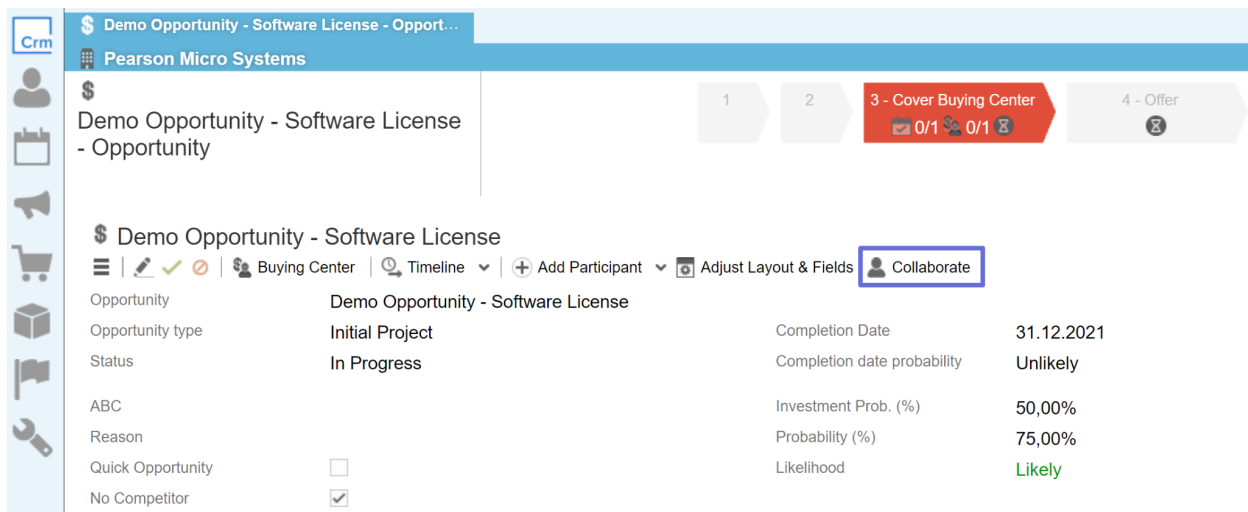
As a user who doesn't have access to ACRM and only uses the Collaboration Platform, refer to Navigating to Opportunity Collaboration Spaces.

Navigating to Opportunity Collaboration Spaces

A Collaboration Space can be accessed in multiple ways.

Via Opportunity

Open the Collaboration Space by using either the "Start Collaboration" (Initiating Collaboration) or "Collaborate" (Collaborating) buttons on the ACRM Opportunity record.

Via Newspage

The "Newly created Opportunity Spaces" tile on the Collaboration Platform Newspage shows all recently created Opportunity Spaces and allows for navigating there.
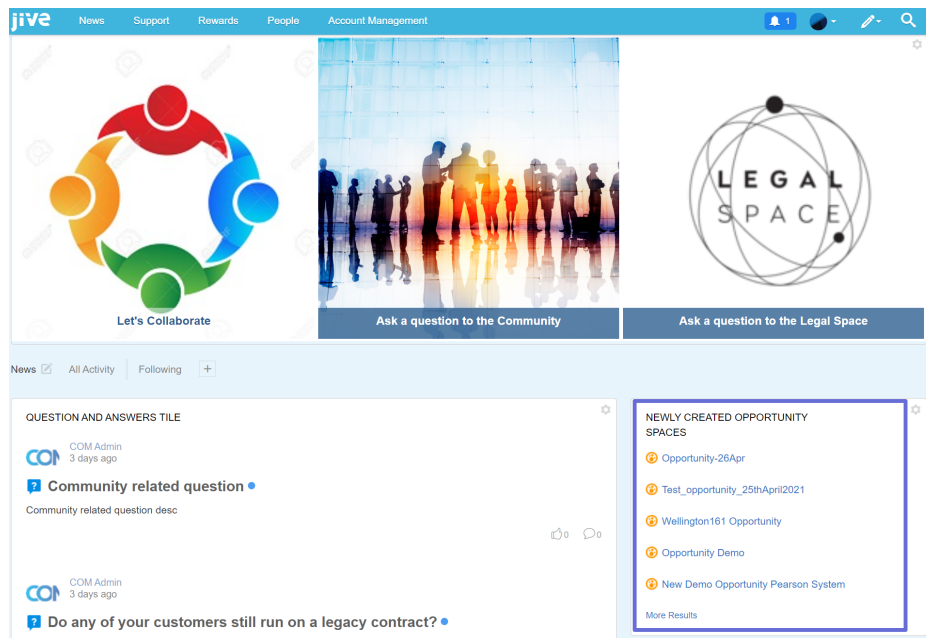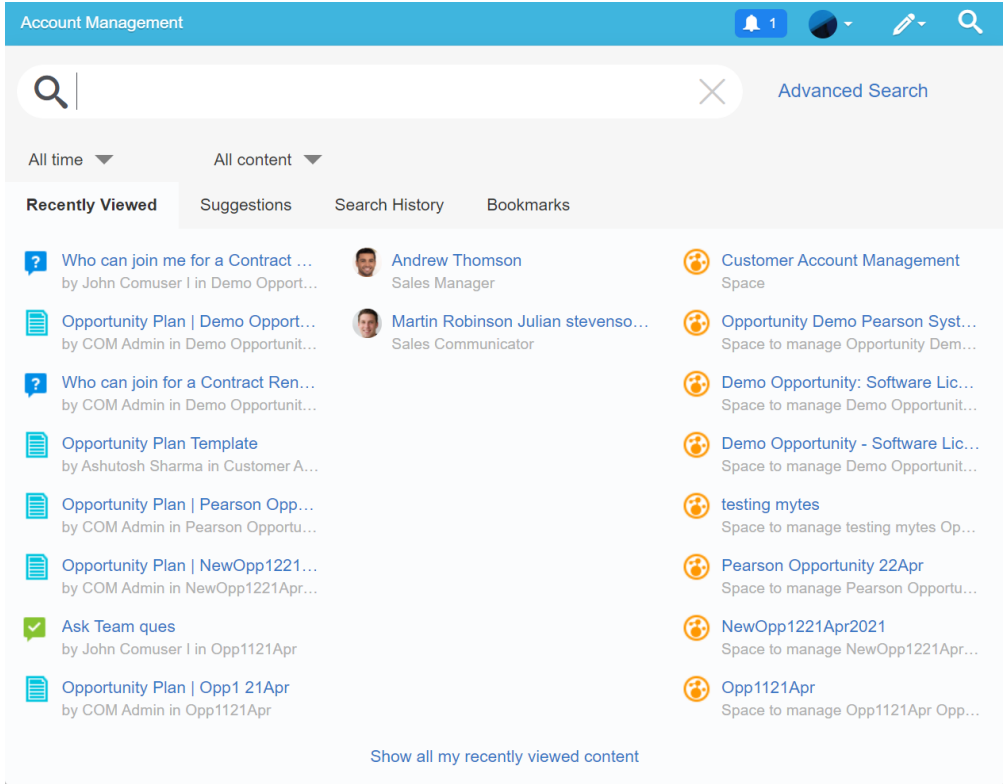

Via Notifications

Users receive Notifications when they are mentioned by other Collaborators or part of an Account Team, for which an Opportunity is created.
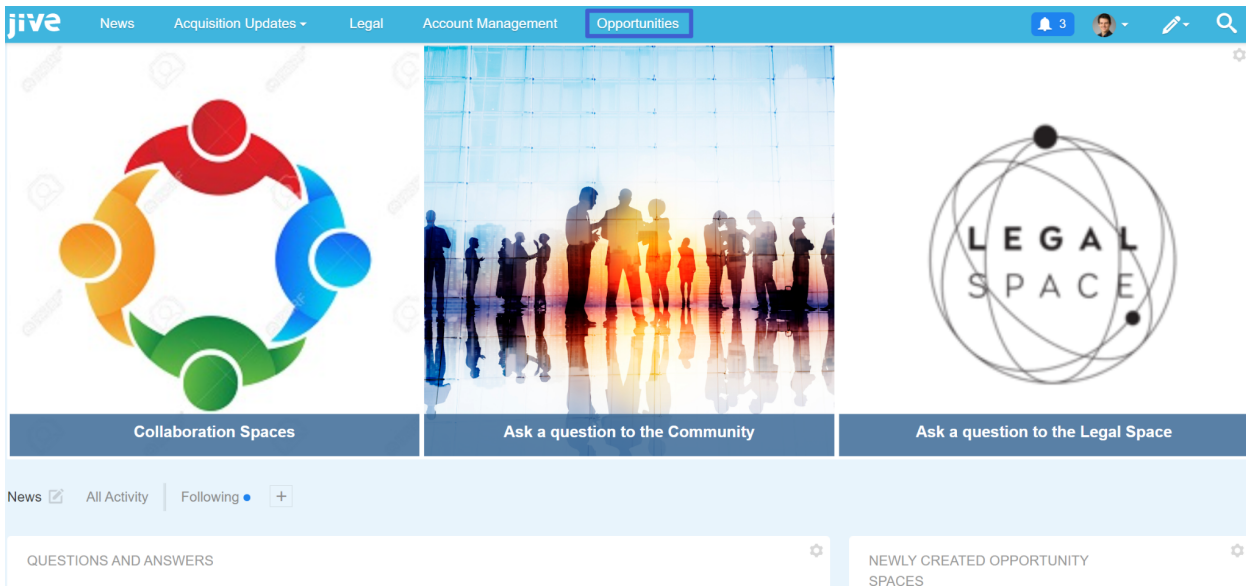

Via Search

The Search Functionality of the Collaboration Platform can be used to find and navigate to spaces and to look at recently visited spaces.

Via Main Menu

A list of all existing Opportunity Spaces can be accessed via the main menu "Opportunities" button.

Opportunity Collaboration Space

The Opportunity Collaboration Space is the place where all Opportunity related collaboration takes place. After creating the space from the ACRM Opportunity via the "Start Collaboration" button, the space is automatically created with the following components.
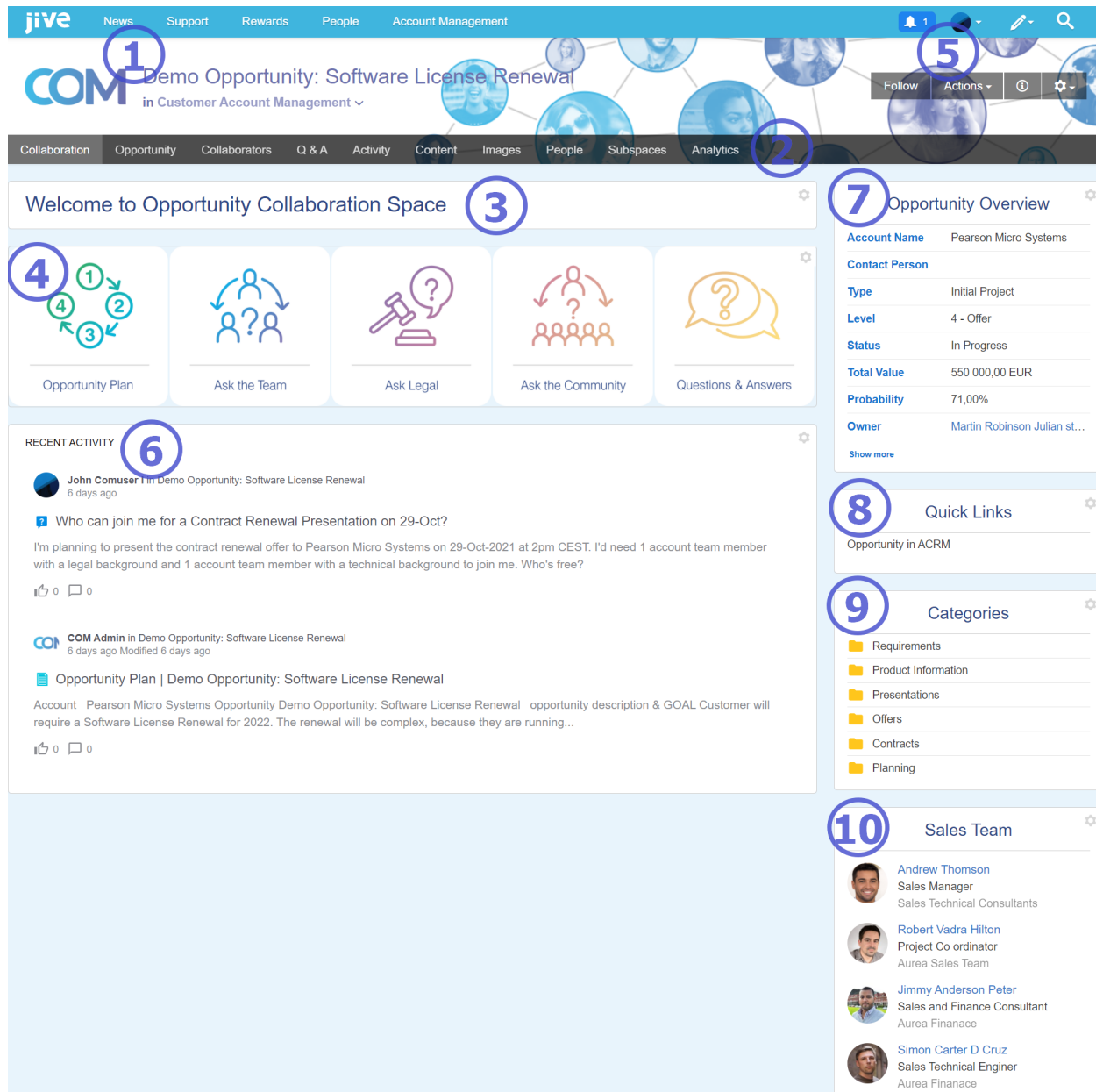
Banner

The Banner contains a background image, a logo as well as a text, containing the name of the Opportunity.

Pages

The space is created with several opportunity collaboration specific, as well as standard pages being present upon space creation:

- Collaboration
- Opportunity
- Collaborators
- Q & A
- Activity
- Content
- Images
- People
- Subspaces
- Analytics

Welcome tile

A static message, which can be utilized to explain the purpose of the collaboration space.

Quick-Collaboration Button tile

Buttons, which can be used to quickly initiate certain Opportunity related collaboration functionalities, based on pre-defined templates and function flows:

- Opportunity Plan
- Ask the Team
- Ask Legal
- Ask the Community
- Questions & Answers

Actions

Various standard Space Actions to interact with the collaboration space, such as uploading files or creating content.

Recent Activity tile

A list of recent activity, which happened in relation to the opportunity collaboration space with the possibility of joining the collaboration by clicking on line items.

Opportunity Overview tile

A brief overview of the ACRM Opportunity record, outlining its most important information as a real-time data feed within the Collaboration page.

Quick Links

Provides the possibility of navigating to the ACRM Opportunity record's details mask by default and can be extended to contain additional links, which are relevant when collaborating with the specific Opportunity, such as company websites, ticketing systems, project plans, related spaces or related records (opportunities, competitors, offers, ..)

Categories tile

Whenever content for the space is created, one of the default categories can be selected. Doing so will allow for content to be found by filtering for a specific category or by simply clicking the desired category within the Categories tile, thereby switching to a pre-filtered Content view.

Sales Team tile

Each Opportunity has a parent account it belongs to and each parent account has a sales team. The Sales Team tile displays all members from the ACRM account sales team as a real-time data feed.

Note: Since the Sales Team is resolved into Collaboration Users by utilizing a matchup by eMail address, Sales Team members who haven't been added to the Collaboration Platform will not be displayed within the tile.

Opportunity Page

The Opportunity Page can be accessed by navigating to "Opportunity" within the grey bar containing the available pages.

The page shows a live data feed from the CRM Opportunity, which is why it can take several seconds to complete loading.

The data shown in this page is read-only and it's recommended to use it to facilitate decision making without the need to jump into the CRM system. In order to adjust the Opportunity data, however, it is necessary to open the Opportunity record via the link on the collaboration page.
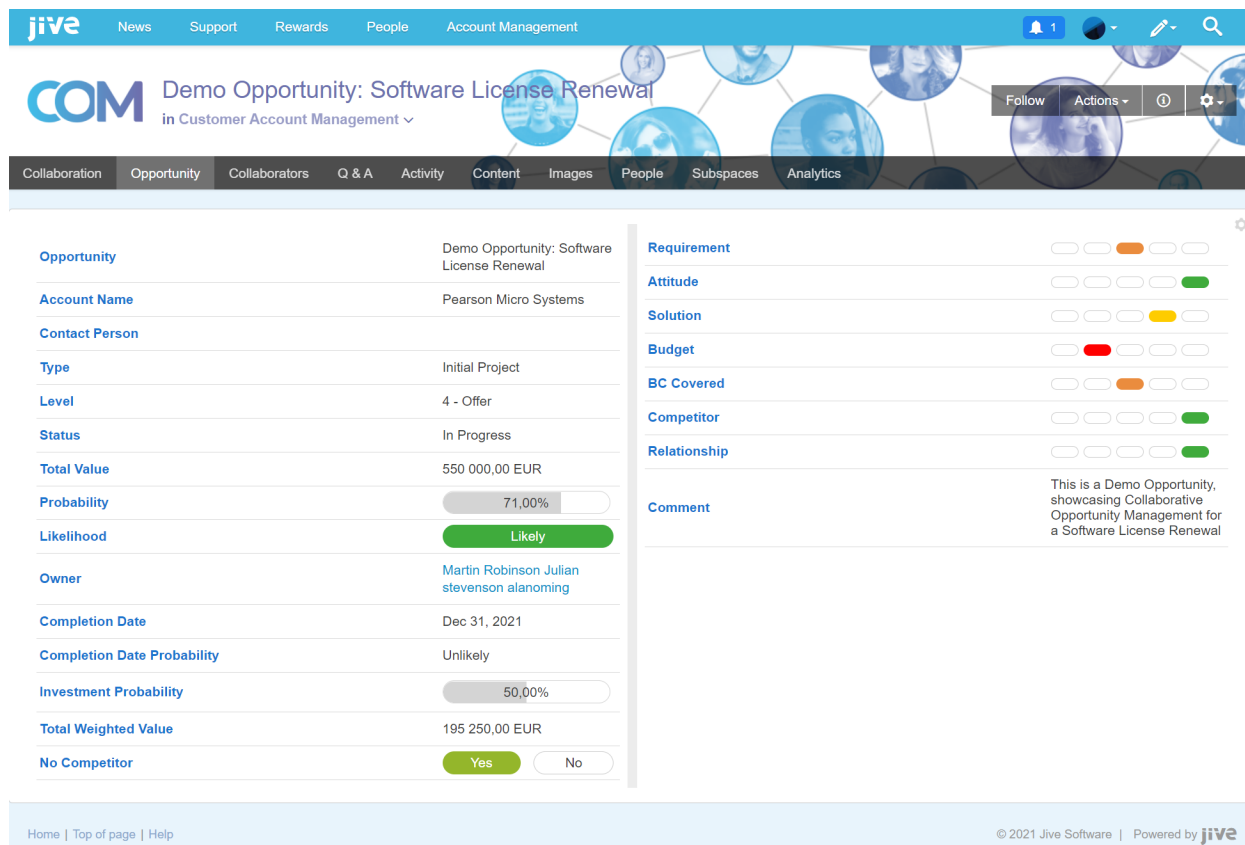
Collaborators Page

The Collaborators Page can be accessed by navigating to "Collaborators" within the grey bar containing the available pages. This page displays all users who have access to the Opportunity Collaboration space.

If a specific user does not appear in the Collaborators page, it means that the user won't have access to the space and needs to be added to the respective security groups by an administrator.

Only 8 collaborators are loaded initially. Another 8 can be displayed by using the "Show more" button at the bottom of the screen.

Additional information on collaborators can be retrieved by clicking on a collaborator's profile picture.

Q & A Page

The Questions and Answers Page can be accessed by navigating to "Q & A" within the grey bar containing the available pages.
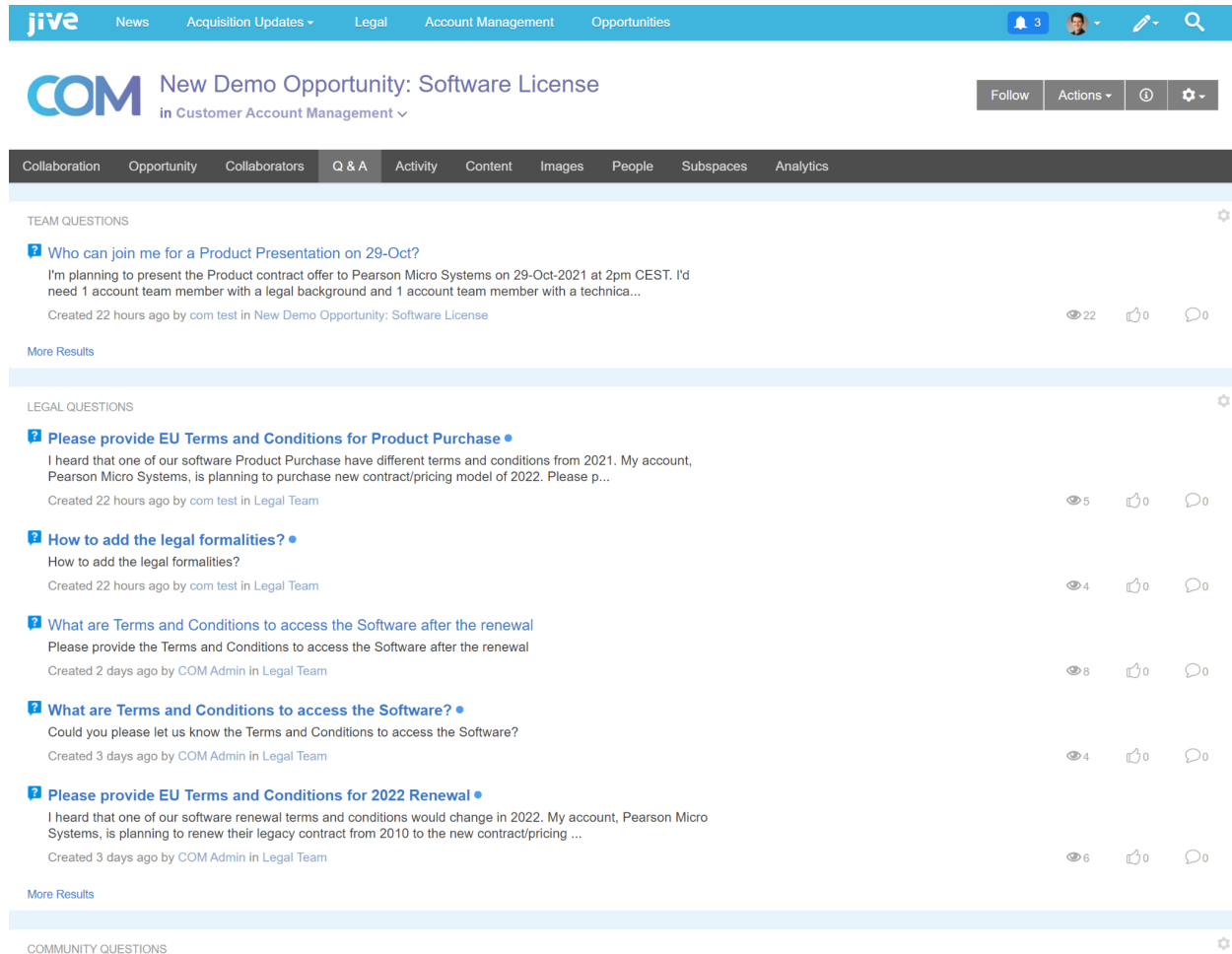
The page consists of 3 sections, displaying different content sources. Each of the sections allows for previewing the question's subject, body, views, likes and comments. Questions can be opened by clicking the blue subject text.

Team Questions This list displays all questions which have been asked directly within this particular Opportunity Collaboration Space. Questions, which are created via the Collaboration Page's Ask the Team button end up in this list.

Legal Questions	This list displays all questions which have been asked to the Legal Team. Its purpose is to quickly identify recently asked legal questions, which could prove beneficial in collaborating on the Opportunity. Questions, which are created via the Collaboration Page's Ask Legal button end up in this list.
Community Questions	This list displays all questions which have been asked to the entire community. Its purpose is to quickly identify recently asked community questions, which could prove beneficial in collaborating on the Opportunity. Questions, which are created via the Collaboration Page's Ask the Community button end up in this list.

Opportunity Plan

Using the "Opportunity Plan" button on the Collaboration Page opens up an Opportunity Plan document template. The document is automatically created upon collaboration space creation and can be edited by using the "Edit" option.

The Template used can be modified by an administrator. See: Configuring an Opportunity Plan Template

The Opportunity Plan is a "living document", located within the Opportunity Collaboration Space. Whenever the "Opportunity Plan" button on the Collaboration Page is used, the latest saved version of the Opportunity Plan is shown.

Ask the Team

The "Ask the Team" button on the Collaboration Page can be used to create a new question, which is automatically published in the context of the Opportunity and therefore seen by the team of Opportunity Collaborators.

❓ **ASK A QUESTION**

Question to the Team

B *I* ☰ ▾ ☰ ▾ " 　Iₓ 🔗 📷 ▶ ••• 　　　@ Mention　# Tag

Details about the question & possibility to mention certain users, tag certain content or add attachments

📎 Attach
Maximum size: 50 MB · Maximum attachments allowed: 30

Publish Location

🔘 **In a Place**　Reach a specific audience or organize your posts by subject or group.
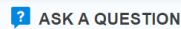
COM　**New Demo Opportunity: Software License**　Change
in Customer Account Management 1 Follower

◯ **Specific People**　Work privately with a few people before opening it up to your community.

Ask Legal

The "Ask Legal" button on the Collaboration Page can be used to create a new question, which is automatically published in the context of the Legal Team Space and therefore seen by all members of the legal team.

The purpose of such questions is to be able to ask colleagues, who are not part of the team of Opportunity Collaborators, but belong to the Legal Team, Opportunity related questions.

? ASK A QUESTION

Question to the Legal Team

B *I* ☰ ▾ ☰ ▾ " Iₓ 🔗 📷 ▶ •••   @ Mention   # Tag

Details about the question and the possibility to mention users, tag content and upload attachments.

📎 Attach
Maximum size: 50 MB • Maximum attachments allowed: 30

Publish Location

◉ **In a Place**   Reach a specific audience or organize your posts by subject or group.

Legal Team Change
1 Follower

○ **Specific People**   Work privately with a few people before opening it up to your community.

Ask the Community

The "Ask the Community" button on the Collaboration Page can be used to create a new question, which is automatically published in the context of the entire community.

The purpose of such questions is to be able to ask all colleagues, irrespective of their department/team allocation, Opportunity related questions.

? ASK A QUESTION

Question to the Community

B *I* ☰ ▾ ☷ ▾ 66 I_x 🔗 📷 ▶ ⋯   @ Mention   # Tag

Add details about the question, mentioned users, tag content and upload attachments.

📎 Attach
Maximum size: 50 MB · Maximum attachments allowed: 30

Publish Location

○ **In a Place**   Reach a specific audience or organize your posts by subject or group.

○ **Specific People**   Work privately with a few people before opening it up to your community.

🔘 **The JiveDemo-Ashutosh Community**   Make your content visible to everyone in your community.

Tag This Question
Tag your content to make it easier to find

🏷️

Questions & Answers

The "Questions & Answers" button on the Collaboration Page can be used to navigate to the Q & A Page and to see all Team, Legal and Community questions at one glance.

Space Actions

Several actions are available in the right upper corner of the Opportunity Collaboration Space. While the most common actions are covered via the Quick Collaboration Button tile, these actions offer additional possibilities of collaboration.
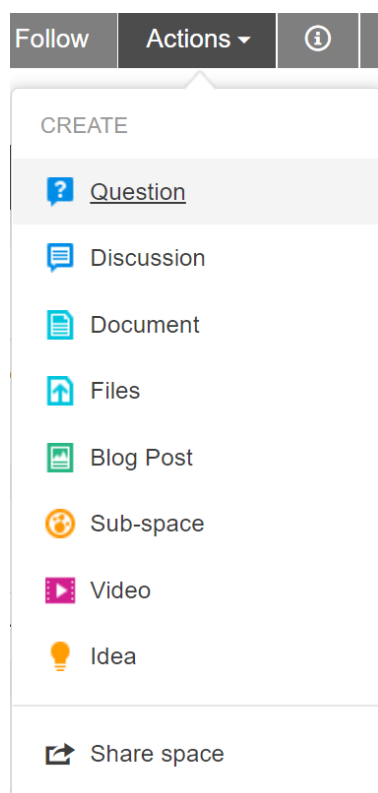
Follow

Following a Space will result in receiving notifications (and, if selected, eMail) for all activities occurring in the space. As an Account Team member, it is recommended to follow spaces, which are actively being worked upon.

Question
A new question can be created. It can be addressed to all of the Collaborators of the Opportunity Space, to members of a different space, to specific people or to the entire Community. Questions are used when a clear output (e.g.: yes, no, 2000 €, 5%, ..) is expected to be achieved.

Discussion
A new discussion can be created. It can be addressed to all of the Collaborators of the Opportunity Space, to members of a different space, to specific people or to the entire Community. Discussions are used when a clear output is not expected and the aim is to have a discussion and to reach a common conclusion after taking into account the opinions of all collaborators.

Document
A new document can be created. It can be addressed to all of the Collaborators of the Opportunity Space, to members of a different space, to specific people or to the entire Community. It's also possible to keep the document private until such a time as publishing it is desired.

Documents can be used for various purposes, but the main benefit of using Documents is to be able to collaborate on one document with several persons. One example of a document is the Opportunity Plan Template, which is created by default for all Opportunity Collaboration Spaces and supports the execution of the Opportunity.

Files
Files can be uploaded to use for Collaboration.

Blog Post
A blog post can be created for the Collaboration Space. This functionality can be used to inform all Collaborators about what's happening.

Sub-space
Subspaces can be created for the Opportunity Collaboration Space. This can be useful if an Opportunity is quite large or consists of multiple parts/phases, which should be treated as separate spaces within the Collaboration platform.

Video
Videos can be uploaded and automatically encoded, such as to be able to view them within the browser.

Idea
A new idea can be created. It can be addressed to all of the Collaborators of the Opportunity Space, to members of a different space, to specific people or to the entire Community. Ideas are useful when trying to get inputs from other persons on certain thoughts.

Share space	Allows to share the space link with another person. The person needs to already have access to the Opportunity space. Granting access is done automatically via the Space creation process as well as manually by administrators. See: Managing Space Access

Account Management Space

The Account Management Space acts as parent Space for all Opportunity Collaboration spaces.

Administrators are Managing Space Access via the Account Management Space and certain document templates and artifacts, which are used during Opportunity Space creation, are stored within the Account Management Space.

The space can be reached via the main menu's "Account Management" button.
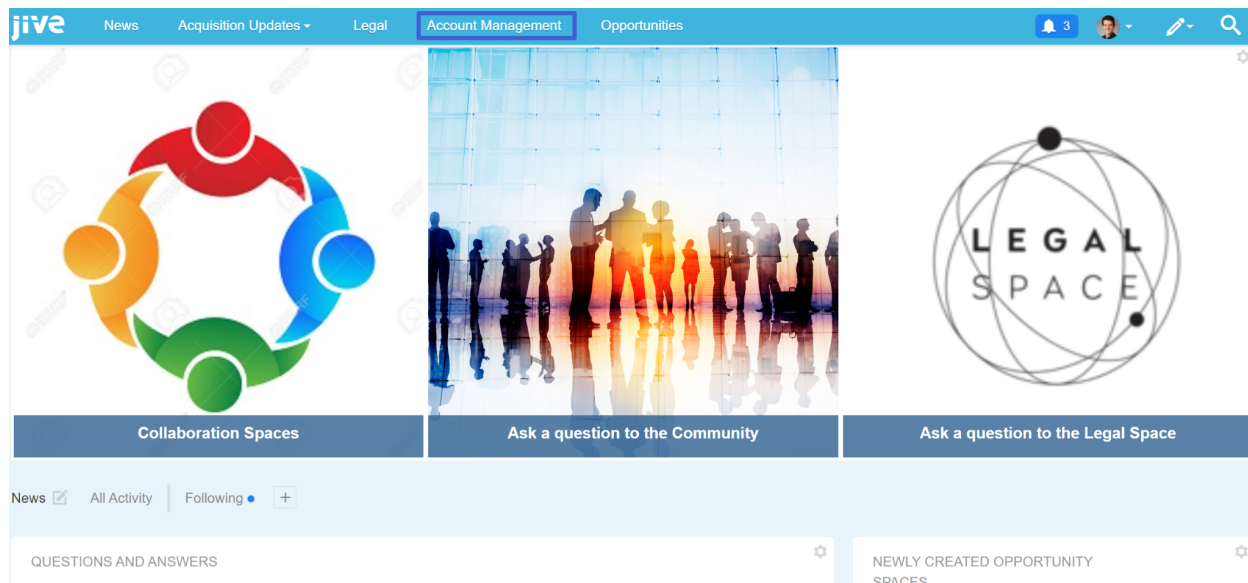
It is possible to use the space for collaborative activities, which concern all Accounts/Opportunities and not only one specific Opportunity Space.

Legal Space

The Legal Space acts as a Collaboration Space for members of the legal department/team. Questions, which are asked via the Ask Legal button end up within the Legal Space.

Access to the Legal Space can be maintained by administrators as required.

The space can be used to collaborate with the Legal Team on any topic that is at hand. The space can be reached via the main menu's "Legal" button.

Newspage

The Newspage (startpage, landing page) can be reached by clicking the "Jive" logo in the upper-left corner of the screen.

Its purpose is for users to get an overview of what is happening within the Collaboration Community and especially in terms of Opportunity Collaboration. There are several elements available on the Newspage, which can be made use of.

Collaboration Spaces	The button leads to a page within a new tab, showing all existing Opportunity Collaboration Spaces in a list view.
Ask a question to the Community	The button leads to the creation of a new Community question within a new tab, similar to Ask the Community via the Opportunity Collaboration Space.

Ask a question to the Legal Space	The button leads to the creation of a new Legal Team question within a new tab, similar to Ask Legal via the Opportunity Collaboration Space.
Questions and Answers	This tile shows all the recently asked questions, including Ask the Team, Ask Legal and Ask the Community questions.
Newly Created Opportunity Spaces	Shows a list of Opportunity Collaboration Spaces, which were recently created. Allows for jumping to any of the displayed spaces to collaborate.
Unanswered Questions	Shows a list of questions, which aren't yet answered. This is to encourage collaborators to try and answer any of the unanswered questions.

3
Managing the solution

The solution is based on configuration parameters, which can be adjusted by Collaboration Platform administration users (administrators) in order to adjust the solution's user experience.

Attention: Be careful when adjusting the settings, as changes might impact the CRM integration and related functionality.

Many of the settings can be centrally managed via the Aurea CRM Opportunity Collaboration Add-On. This Add-On configuration can be reached by first navigating to Add-Ons.

Then selecting the Add-On and choosing to navigate to its settings.

Add-on Name

Aurea CRM Opportunity Collaboration Add-On

Collaborate on opportunities in ACRM using the power of Jive. Developed

Upon which the "Configure Now…" action is shown and leads to a pop-up, containing various settings.

Configuring a Welcome Message

Within the Add-On settings, the default Welcome Message of the Opportunity Collaboration Space can be configured. Enter a different text in order to change the welcome message for all Opportunity Collaboration Spaces, which are created in the future.

Adjusting visible Opportunity Space pages

As a Space Administrator, it's possible to hide, rearrange or rename certain pages from an Opportunity Collaboration Space. To do so, navigate to the Opportunity Collaboration space, which is to be adjusted and open the Navigation Settings.
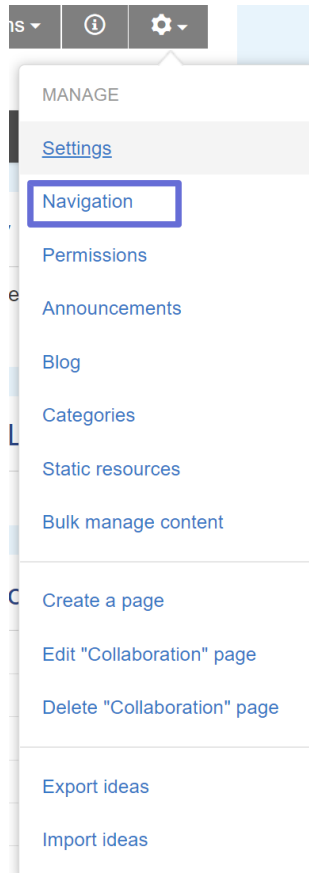
Configure the pages of the Opportunity Collaboration Space as required.

Configure Navigation ✕

You can rearrange, show, and hide links in the navigation bar, as well as rename your custom pages.

Collaboration	✏	👁
Opportunity	✏	👁
Collaborators	✏	👁
Q & A	✏	👁
Activity		👁
Content		👁
Images		👁
People		👁
Subspaces		👁
Analytics		👁

Apply   Cancel

Configuring an Opportunity Plan Template

The Opportunity Plan template, which is used by default when a new space is created by the automation, can be configured via the Add-On settings.

Choose a different document to act as template and the document will automatically utilized as Opportunity Plan template for all Opportunity Collaboration Spaces, which are created in the future.

Configure "Aurea CRM Opportunity Collaboration Add-On"

Configuring Quick Links

The Quick Links contain a link to the ACRM Opportunity record by default. Additional quick links can be added to a specific Opportunity Collaboration Space by following these steps.

1. Choose to configure the Quick Links tile.
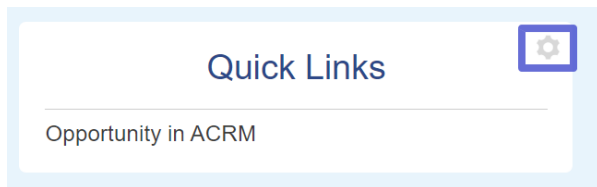
2. Manage Quick Links

Opportunity Collaboration: Quick Links
Tile   ⚙

✅ **Tile saved**

Your tile is now configured and ready for publishing. You can make any changes to these settings using the links below.

▸ **General Settings**
  Adjust various display options and messaging.

▸ **Layout Settings**
  Modify heading text and color.

▸ **Manage Quick Links**
  Create and edit quick links.

☐ Import / Export tile configuration?

💾 SAVE TILE SETTINGS   CANCEL   © 2021 Created by Jive Software

3. Add a new Quick Link with a name and a URL.

Opportunity Collaboration: Quick Links
Tile   ⚙

Display name *

Google

Web URL *

https://www.google.com/

SAVE ITEM   CANCEL

☐ Import / Export tile configuration?

💾 SAVE TILE SETTINGS   CANCEL   © 2021 Created by Jive Software

4. Continue to save the tile, then save the space settings.

The new link is added to the Quick Links tile.

Configuring categories

The categories, which are present by default when a new space is created by the automation, can be configured via the Add-On settings.

Add/remove categories and the updated list of categories will automatically be used for all Opportunity Collaboration Spaces, which are created in the future.
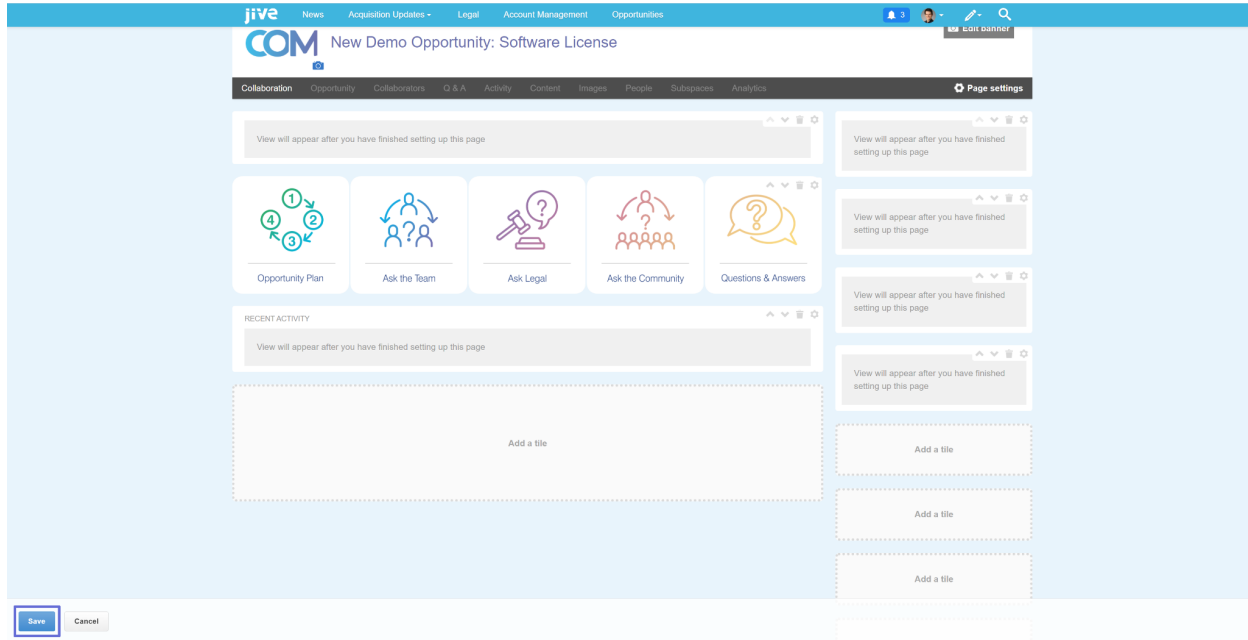
Configure "Aurea CRM Opportunity Collaboration Add-On"

Opportunity

Plan Template *

| Opportunity Plan - Template (COOP-199) | ✕ ▾ |

Legal Space *

| 🐵 Legal Team | ✕ ▾ |

Welcome Message *

| Welcome to Collaboration Opportunity |

Content Categories *

| Requirements, Product Information, Presenta |

add comma separated values e.g., digital, sales, marketing

Banner Images   [Add Image]

#	Caption	Image URL	Target URL	Actions
#1	Opportunity Plan	https://jivedemo-ashutos	https://jivedemo-ashutos	⠿ 🗑
#2	Ask the Team	https://jivedemo-ashutos	https://jivedemo-ashutos	⠿ 🗑

Managing Space Access

User permissions are automatically created via the ACRM integration. However, in some cases it might be necessary to add certain users to certain security groups in order to fulfill specific business goals. This is how access to the Account Management space (and therefore to the Collaborative Opportunity Management spaces) can be managed.
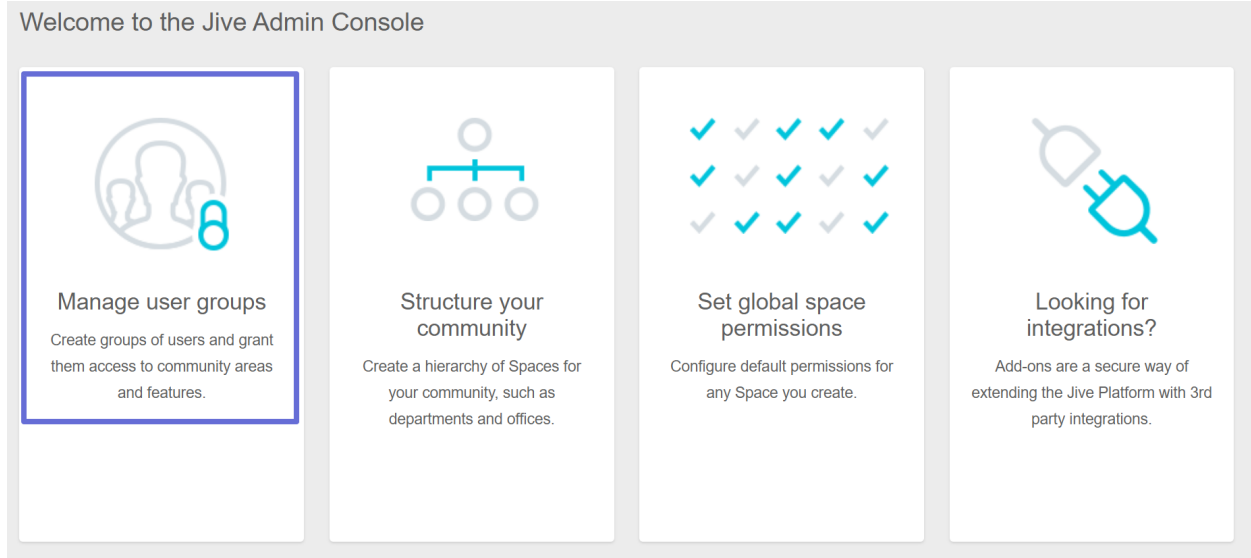
1. Navigate to the Admin Console.

2. Choose to Manage user groups.

Welcome to the Jive Admin Console

Manage user groups

Create groups of users and grant them access to community areas and features.

Structure your community

Create a hierarchy of Spaces for your community, such as departments and offices.

Set global space permissions

Configure default permissions for any Space you create.

Looking for integrations?

Add-ons are a secure way of extending the Jive Platform with 3rd party integrations.

3. Move to Space Permissions.

Permissions

User Groups

Space Permission Levels

System Administrators

Spaces

Social Groups

Blogs

Content

4. Find the Account Management Space and select to Configure permissions.
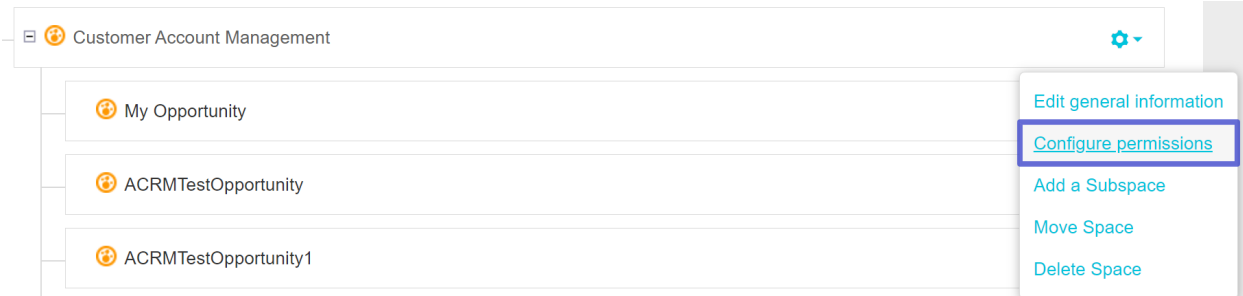
5. Choose which user group to edit - either the Administrators or the Collaborators.

6. Edit the members of the selected group.

User Group Settings for **Customer Account Management - Collaborators**   ?

User Group Name:	Customer Account Management - Collaborators
Description (optional):	

Visible to News Admins:

Allows this group to be selected as part of a News audience.   ● Yes   ○ No

User Group Details

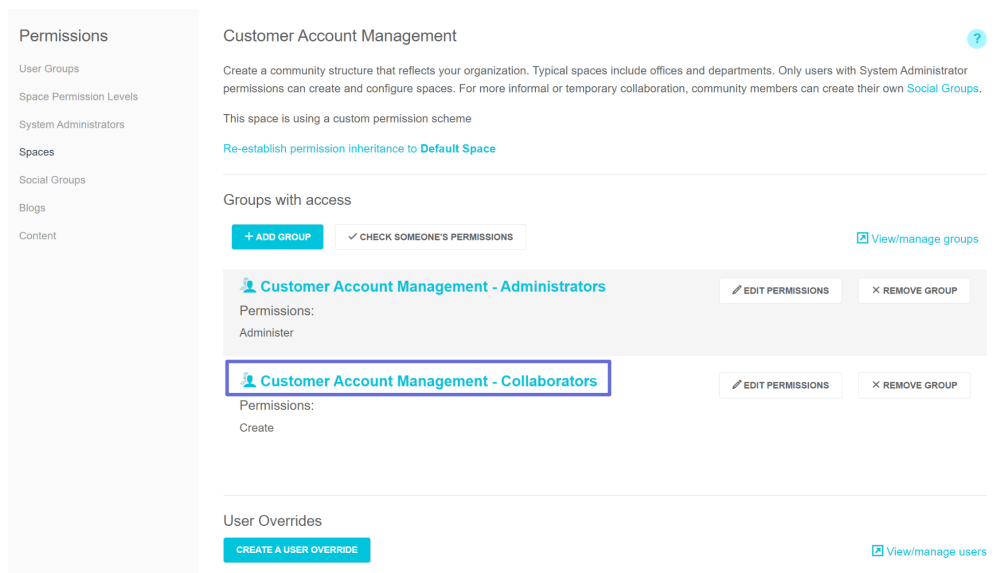| Created:	Jan 29, 2021 8:40:44 PM
Federated:	false
Members: [Edit]	10: ajay.kumar@aurea.com, emily.peterson@aurea.com, henry.cooper@aurea.com, jimmy.anderson@aurea.com, kevin.peterson@aurea.com, martin.robinson@aurea.com, padmini1@test.com, robert.vadra@aurea.com, sales.management@aurea.com, simon.carter@aurea.com

UPDATE GROUP   CANCEL

Permissions
- User Groups
- Space Permission Levels
- System Administrators
- Spaces
- Social Groups
- Blogs
- Content

7. Edit the group members as required. Their updated permissions will immediately come into effect.

Permissions
- User Groups
- Space Permission Levels
- System Administrators
- Spaces
- Social Groups
- Blogs
- Content

User Groups   ?

Creating a user group helps you quickly assign permissions to specific people rather than a system defined group such as Everyone or All Registered Users. Once you create a user group, you can grant the group access to community features such as Spaces, Social Groups, Blogs, and Content.

Add Members to **Customer Account Management - Collaborators**

Jane Doe

👤

ADD SELECTED USERS

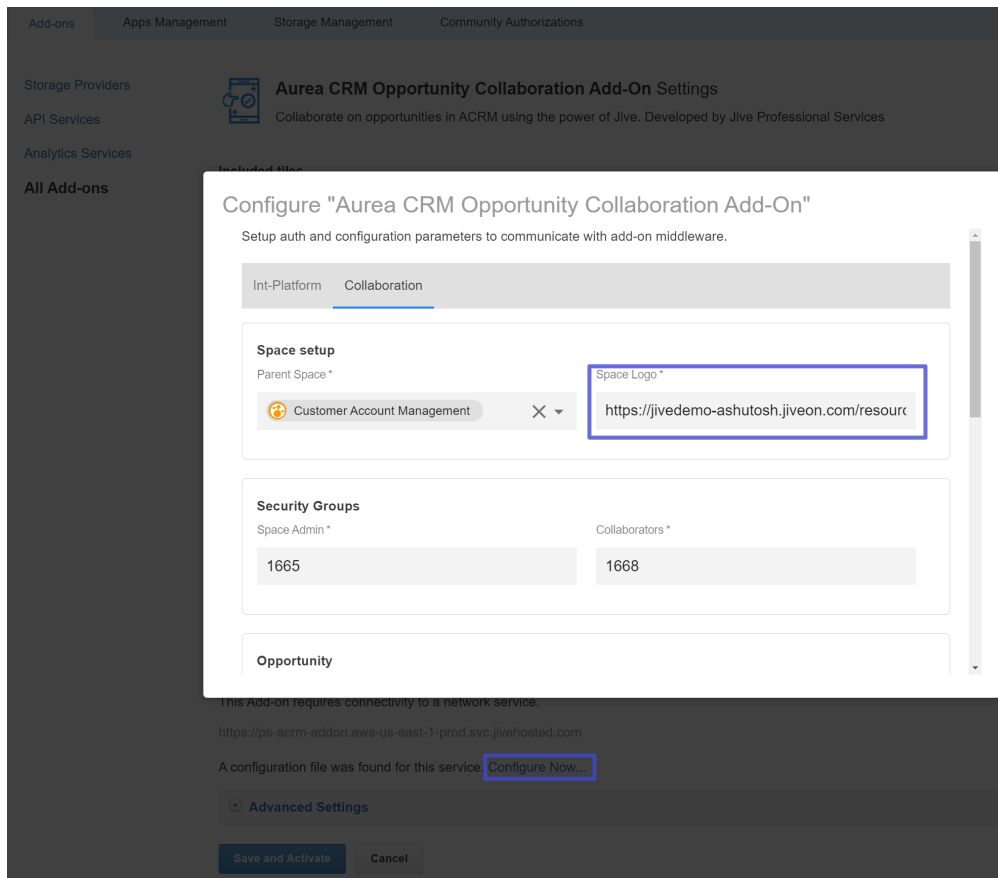Group Members for **Customer Account Management - Collaborators**

🔍   FILTER   CLEAR

	Username	Name	Remove
1	ajay.kumar@aurea.com	John Smith	☐
2	emily.peterson@aurea.com	Emily Peterson	☐
3	henry.cooper@aurea.com	Henry Cooper	☐
4	jimmy.anderson@aurea.com	Jimmy Anderson Peter	☐
5	kevin.peterson@aurea.com	Kevin Peterson	☐
6	martin.robinson@aurea.com	Martin Robinson Julian	☐
7	padmini1@test.com	Padmini Test	☐
8	robert.vadra@aurea.com	Robert Vardra Hilton	☐
9	sales.management@aurea.com	Andrew Thomson	☐
10	simon.carter@aurea.com	Simon Carter D Cruz	☐
			REMOVE SELECTED

Configuring Collaboration Space Look and Feel

Some aspects of how the Opportunity Collaboration Spaces look like by default can be adjusted via the Add-On configuration. By using different image resources for the Space Logo and the individual images, future spaces will be created using the updated design.

Configure "Aurea CRM Opportunity Collaboration Add-On"

Opportunity

Plan Template *

| Opportunity Plan - Template (COOP-199) | ✕ ▾ |

Legal Space *

| 🌐 Legal Team | ✕ ▾ |

Welcome Message *

| Welcome to Collaboration Opportunity |

Content Categories *

| Requirements, Product Information, Presenta |

add comma separated values e.g., digital, sales, marketing

Banner Images   Add Image

#	Caption	Image URL	Target URL	Actions
#1	Opportunity Plan	https://jivedemo-ashutos	https://jivedemo-ashutos	⠿ 🗑
#2	Ask the Team	https://jivedemo-ashutos	https://jivedemo-ashutos	⠿ 🗑