



Customer Relationship  
Management

# Collaborative Opportunity Management

User Guide



# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)
- [Support](#)

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# Support

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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](mailto: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.

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# 1

## Feature overview

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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 newpage, 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

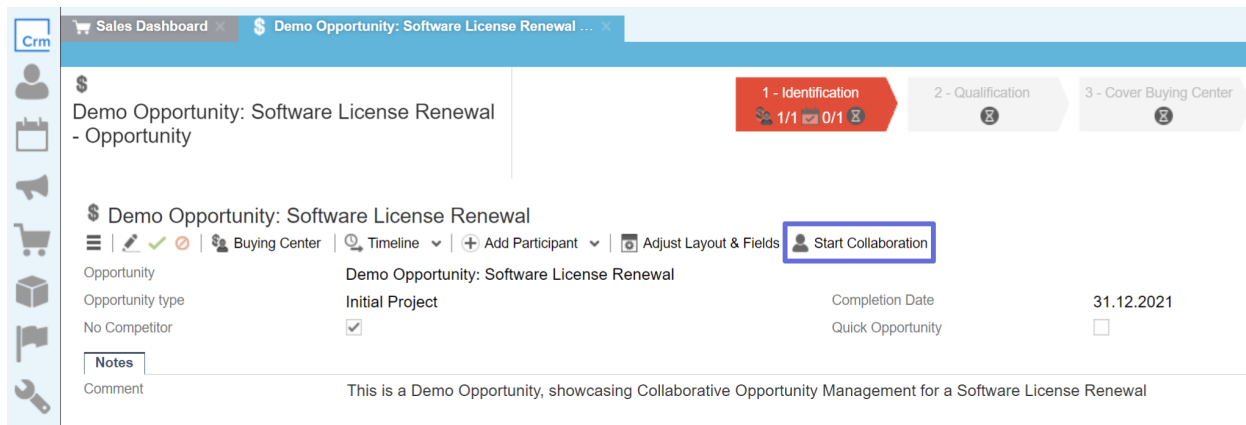
# 2

## 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

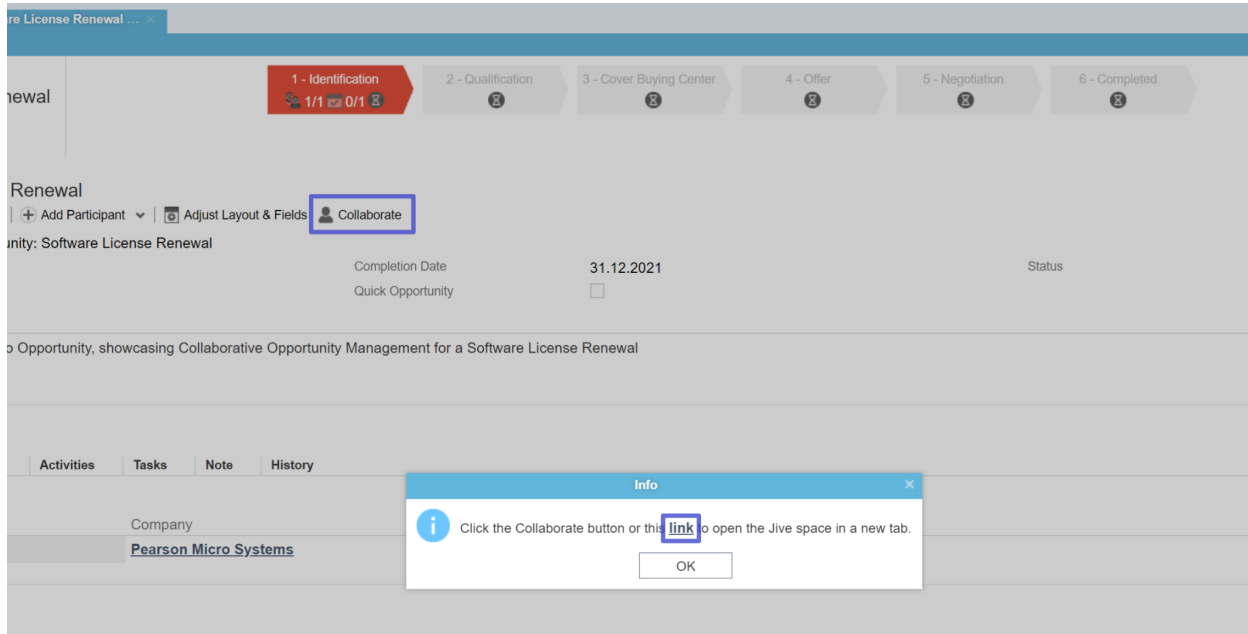
A "Start Collaboration" button is visible on any ACRM Opportunity's Details mask, as long as that Opportunity is not yet completed and Collaboration hasn't yet been started for it.



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.

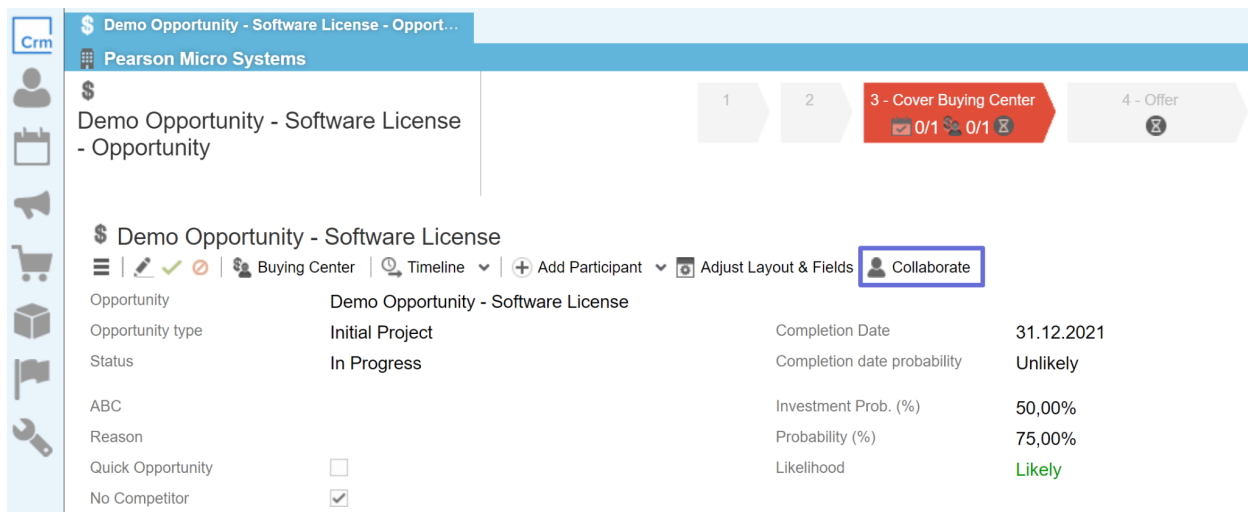
Note: The action can fail if there's already another Opportunity with the same name in the system, for which Collaboration has been started.

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

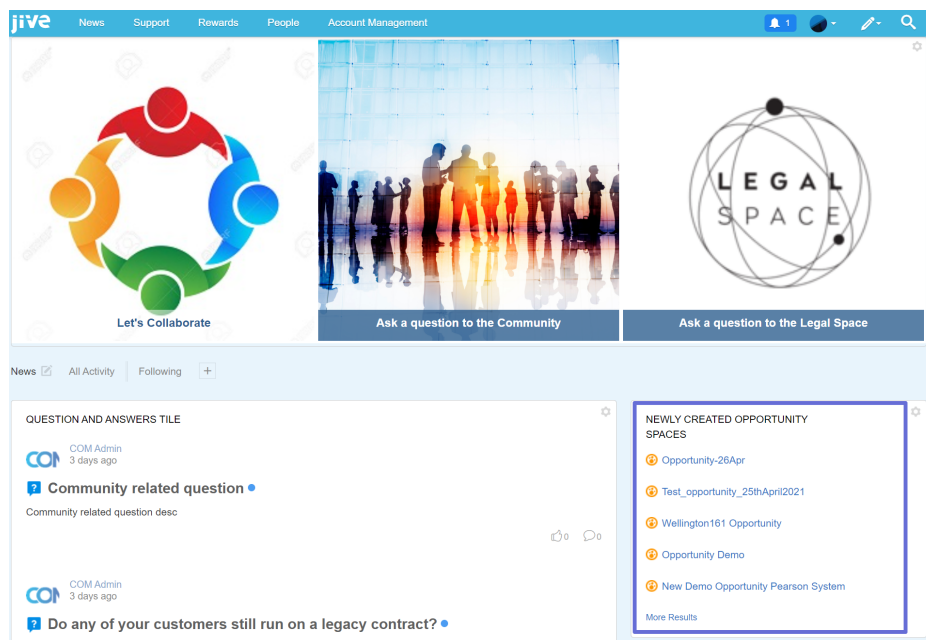
A Collaboration Space can be accessed in multiple ways.

## Via Opportunity

Open the Collaboration Space by using either the “Start Collaboration” ([Initiating Collaboration](#)) or “Collaborate” ([Collaborating](#)) buttons on the ACRM Opportunity record.

## Via Newpage

The “Newly created Opportunity Spaces” tile on the Collaboration Platform Newpage shows all recently created Opportunity Spaces and allows for navigating there.



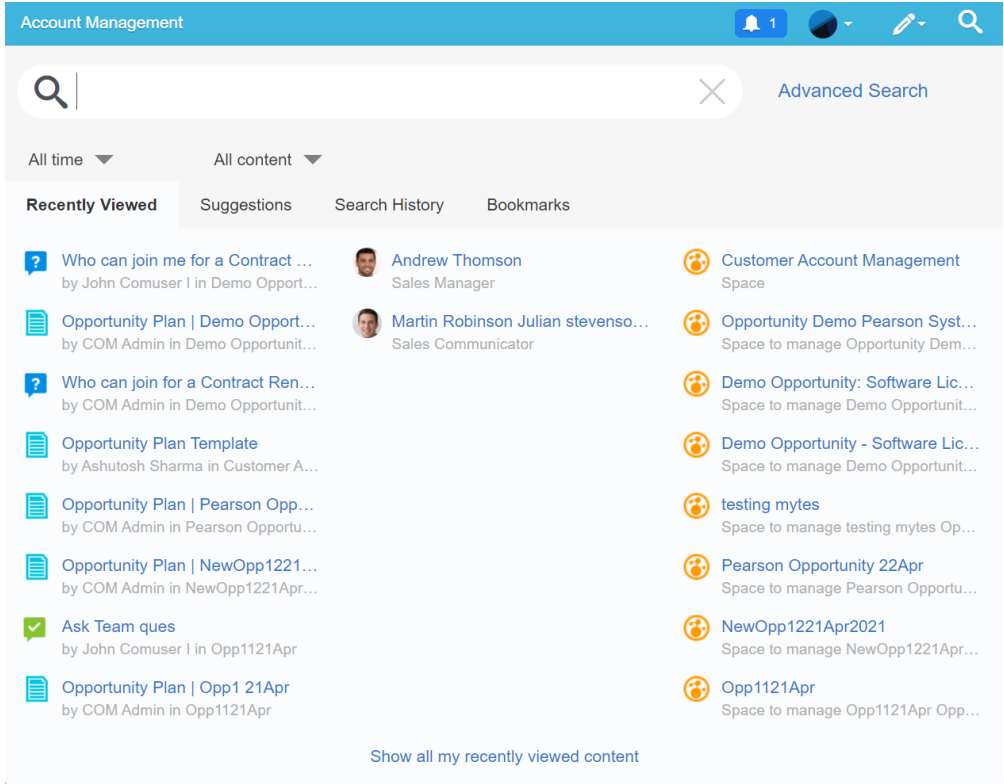
## Via Notifications

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



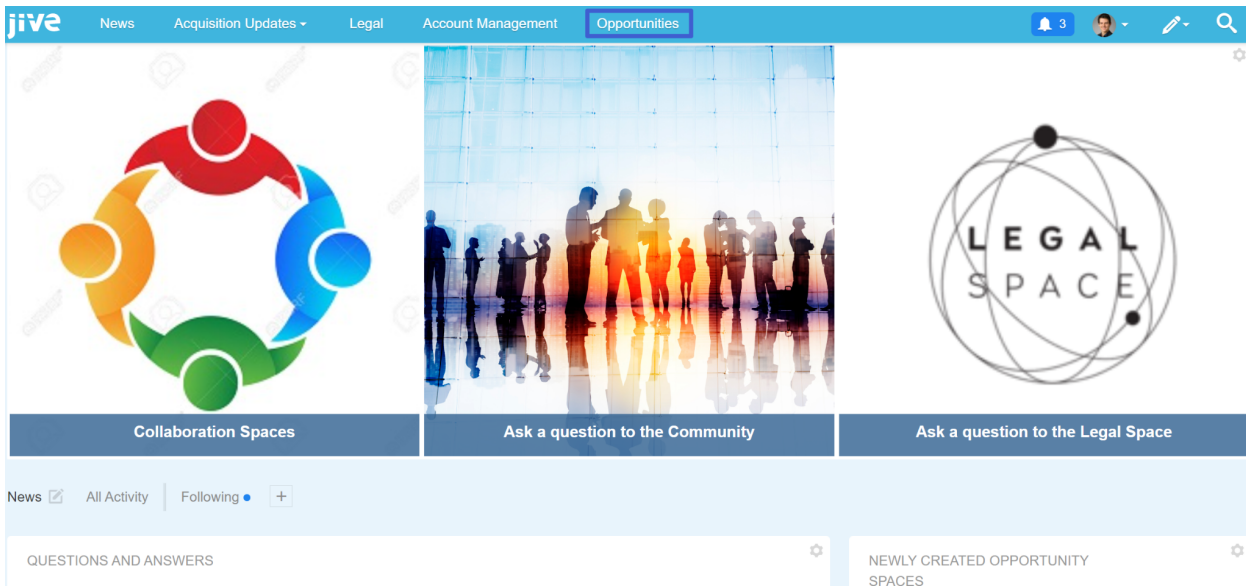
## Via Search

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



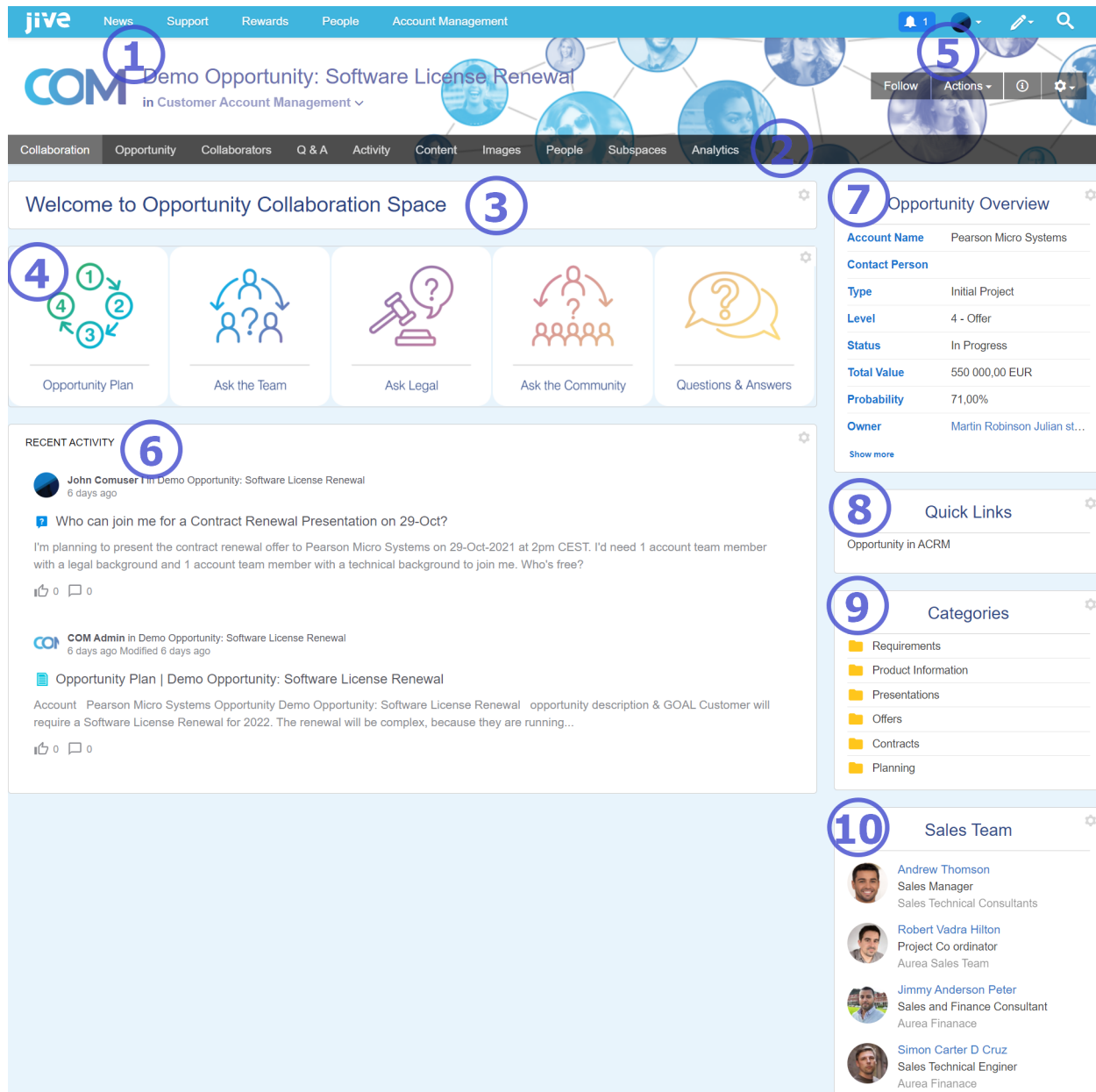
## Via Main Menu

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.

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**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.

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## 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.

The screenshot displays the Jive software interface for a 'Demo Opportunity: Software License Renewal' in Customer Account Management. The page is divided into several sections:

- Header:** Includes the Jive logo, navigation links (News, Support, Rewards, People, Account Management), and user profile information.
- Navigation Bar:** Contains tabs for Collaboration, Opportunity, Collaborators, Q & A, Activity, Content, Images, People, Subspaces, and Analytics.
- Opportunity Details (Left Panel):**
  - Opportunity:** Demo Opportunity: Software License Renewal
  - Account Name:** Pearson Micro Systems
  - Contact Person:** (Empty)
  - Type:** Initial Project
  - Level:** 4 - Offer
  - Status:** In Progress
  - Total Value:** 550 000,00 EUR
  - Probability:** 71,00% (Progress bar)
  - Likelihood:** Likely (Green button)
  - Owner:** Martin Robinson Julian, stevenson alanoming
  - Completion Date:** Dec 31, 2021
  - Completion Date Probability:** Unlikely
  - Investment Probability:** 50,00% (Progress bar)
  - Total Weighted Value:** 195 250,00 EUR
  - No Competitor:** Yes (Green button), No (Grey button)
- Requirement Metrics (Right Panel):**
  - Requirement:** Progress bar (Orange)
  - Attitude:** Progress bar (Green)
  - Solution:** Progress bar (Yellow)
  - Budget:** Progress bar (Red)
  - BC Covered:** Progress bar (Orange)
  - Competitor:** Progress bar (Green)
  - Relationship:** Progress bar (Green)
- Comment:** This is a Demo Opportunity, showcasing Collaborative Opportunity Management for a Software License Renewal.

Footer: Home | Top of page | Help | © 2021 Jive Software | Powered by jive

## 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.

The screenshot displays the Jive Collaborators Page for a "New Demo Opportunity: Software License in Customer Account Management". The page features a navigation bar with categories like Collaboration, Opportunity, Collaborators, Q & A, Activity, Content, Images, People, Subspaces, and Analytics. Below the navigation, there are 8 collaborator profiles arranged in a 2x4 grid. Each profile includes a name, a profile picture, and follower/following counts. A "Show more" button is located at the bottom left of the grid.

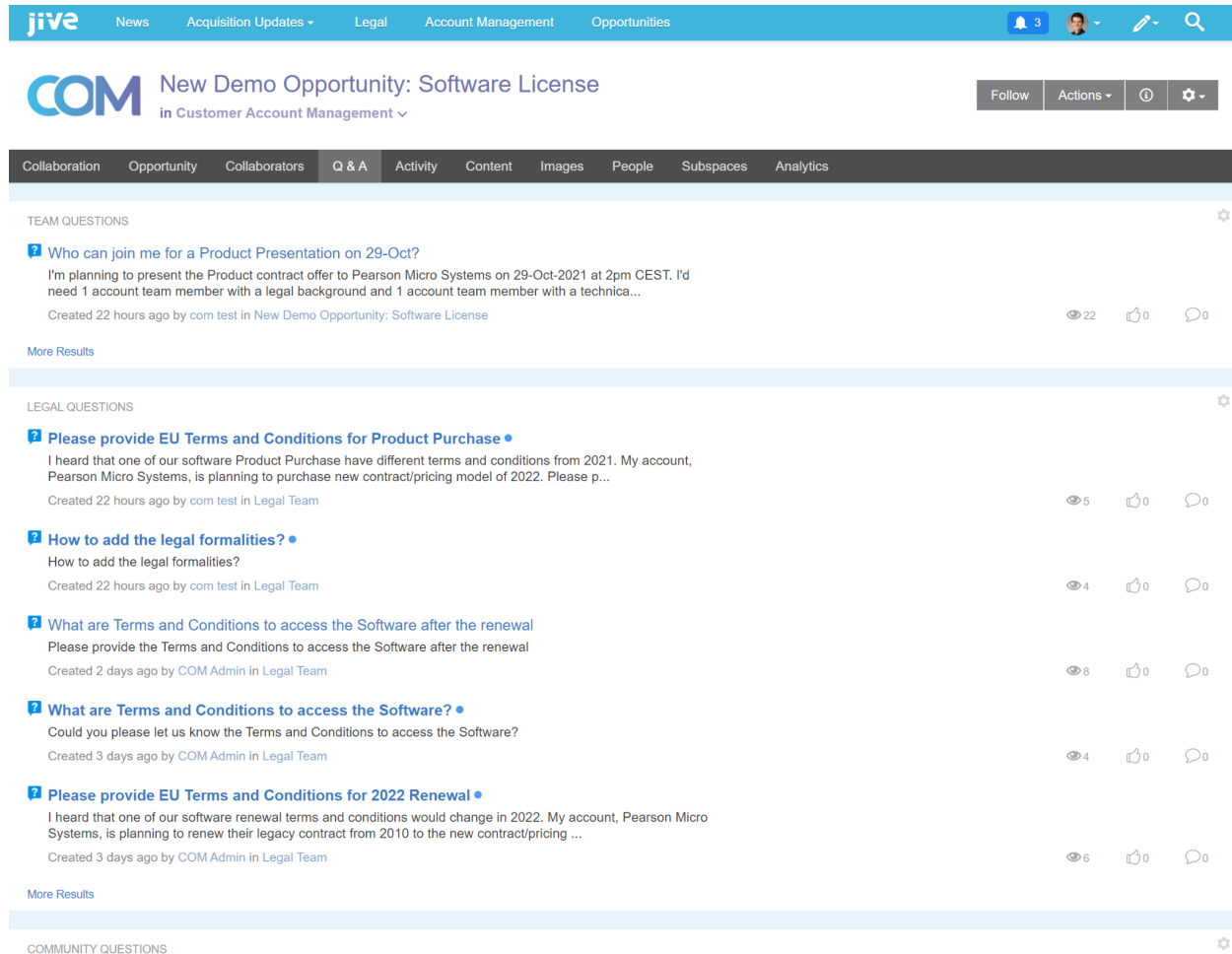
Name	Role	Team	Followers	Following
Andrew Thomson	Sales Manager	Aurea Technical Team	0	0
Emily Peterson	Sales and Finance Consultant	Aurea Finance	0	0
Henry Cooper	Sale Manager	Aurea Technical Team	1	0
Jimmy Anderson Peter	Project Co ordinator Manager	Aurea Sales Team	0	0
John Smith	Mr. PS.Aurea		0	0
Kevin Peterson	Sales Communicator	Sales Management Consultant	0	0
Lloyd Thomas			0	0
Martin Robinson Julian			0	0

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 screenshot displays a Jive document interface. At the top, there is a navigation bar with 'jive' logo and menu items: News, Acquisition Updates, Legal, Account Management, and Opportunities. A notification bell shows 3 alerts. Below the navigation bar, the document title is 'Opportunity Plan | New Opportunity-28Apr'. A metadata bar indicates the document was created by COM Admin on Apr 28, 2021, and last modified by com test on Apr 29, 2021. It is labeled as 'Version 3'. The document content is organized into sections: 'ACCOUNT' (Pearson Micro Systems) and 'OPPORTUNITY' (New Demo Opportunity: Software License). The 'OPPORTUNITY DESCRIPTION & GOAL' section states: 'Customer will require a Software License Renewal for 2022. The renewal will be complex, because they are running on a contract from 2010 with legacy terms and conditions and a different pricing model.' The 'OPPORTUNITY CHALLENGES' section states: 'In order to retain the customer and achieve a successful renewal of the licenses, we need to ensure that all renewal artifacts are prepared upfront and reviewed with the customer sponsor, such as to have enough time buffer for correction before the renewal is due.' The 'OPPORTUNITY ACTIONS TO WIN' section contains a table with three rows of actions.

OPPORTUNITY ACTIONS TO WIN					
No.	Action	Target date	Responsible person	Additional resources	Progress notes
1.	Share Terms and Conditions with Account Executive	10-May-2021			Open
2.	Share GDPR contract material with Account Executive	10-May-2021			Open
3.	Prepare customer facing slide-deck for initial alignment on Purchase terms	10-June-2021			Open

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*☰☰“I🔗📷📺⋮

@ 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

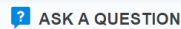
in Customer Account Management 1 Follower

**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.



## Question to the Legal Team

**B** *I*    *I<sub>x</sub>*    

@ 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*    I<sub>x</sub>    

@ 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

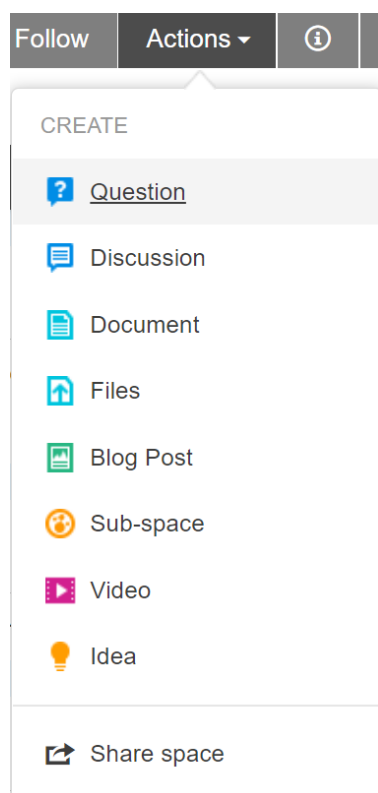


## Questions & Answers

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

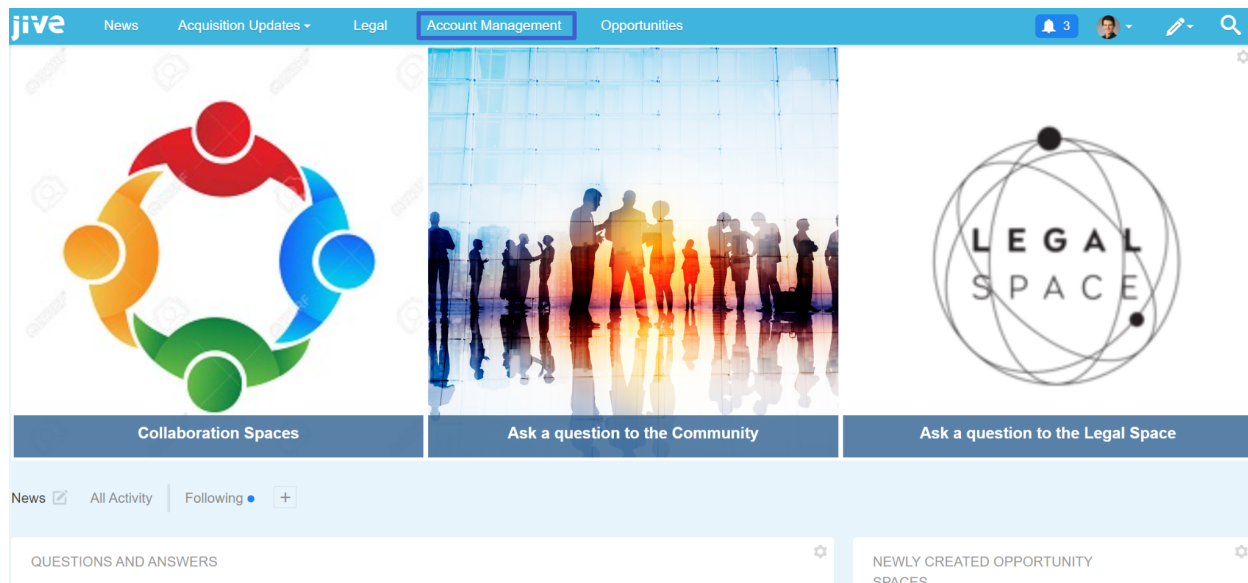
Allows to share the space link with another person. The person needs to already have access to the Opportunity space. Granting access is done automatically via the Space creation process as well as manually by administrators. See: [Managing Space Access](#)

# 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.