

Working with Opportunity Sites

Dalikoo is designed to help your business leverage the power of Sharepoint to track your contracts from the time they become leads through to completion. By using opportunity sites, you can manage contract milestones, assign tasks to individual team members, manage documents and schedule invoices.

This makes Dalikoo a one-stop resource for your sales and marketing, project management and finance teams. Once your teams become familiar with what Dalikoo offers, they will be able to work efficiently together across functions, with up-to-date business intelligence.

First – Add Milestone Types

Your business will have different types of milestones associated with your work. It could be Quoting, Negotiating, Ordering, Shipping. Maybe your milestones involve design and layout, or developing schematics. This is up to you.

To add Milestone Types, follow a similar process to Adding Opportunity Types in the first guide.

Management

- Clients
- Opportunities
- Opportunity Types
- Milestones Types

Reports

- Invoice reports
 - Billed Vs. Paid
 - Cash Forecast
 - Invoicing Schedule
- Project Reports
 - Milestones
 - Hours Complete

Hide menu

[+ new milestone type](#) or [edit](#) this list

All Items

✓	Milestone Type	Phase	Start Week	Duration In Weeks	Sr Hours	Jr Hours	Opportunity Type	
	Quoting	...	Bidding	0	1	2	5	Food Supply; Furniture; Networking; Power Bars; Purses; Shoes
	Scheduling	...	Bidding	1	1	1	3	Auto Parts; Food Supply; Furniture
	Business Case	...	Bidding	2	1	3	4	Auto Parts; Furniture; Networking; Power Bars
	Strategy	...	Planning	2	1	6	2	Food Supply; Purses
	Design	...	Planning	3	2	6	4	Shoes

Click on the Milestone Types in the left-hand navigation bar under Management. This will take you to the list of Milestone Types (if any exist) and allow you to add new Milestone types.

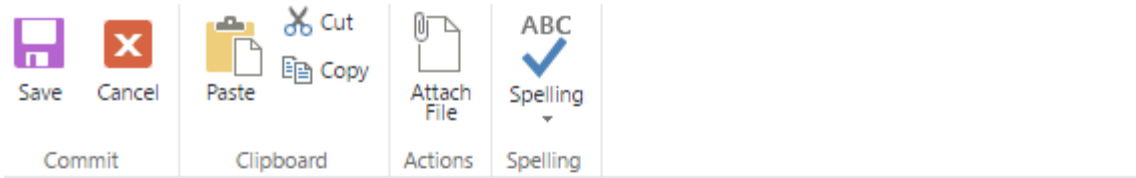
Click new milestone type.

This will open a form where you input details about the milestone type.

Add the name for the Milestone Type, Phase (in the project), the week it begins in your Opportunity project, and number weeks anticipated to take.

Specify number of Sr. Hours and Junior hours expected to take (or customize according to the steps below).

Finally, associate the milestone with one or more Opportunity Types.



Milestone Type *

Phase

Start Week *

Duration In Weeks *

Sr Hours

Jr Hours

Opportunity Type

Auto Parts		Furniture
Food Supply		Networking
Power Bars		File Server
Purses		
Shoes		

Customizing Milestone Types

You can modify the types of fields you can input in your Milestone Types by clicking on the ... menu in the Milestone Types dashboard. And clicking Modify this view.

Check or uncheck the column names and their position from left in the Milestone Types dashboard.

Opportunity sites and Client Sites

Intro to Client Sites

Client sites let you easily manage your client contacts. By keeping their information up-to-date, the entire team will have access to your client contacts, including company address, key project contacts and billing information.

To create a client site, go to the Clients display under Management, click the ... in the client row, and select "Create Client Site" from the menu.

Once the site is created (it will take a few moments for Sharepoint to generate) you can add and edit client contact details under various categories, including Shipping information, Customer Contact and Bill To.

You'll find Client Sites easy to work with.

Intro to Opportunity Sites

Opportunity Sites, as mentioned above, allow you to manage your leads as they become contracts and track them through completion.

The process for creating an Opportunity site is similar to that of a Client Site. Click the ... in your Opportunity list to open a menu. You'll see the option to Create Project Site. The site can be created at any stage in the opportunity, whether it is an early lead, or you've been awarded the contract.

Once the site is created, you can attach documents, add milestones involved in the contract's completion, create and assign tasks, and track invoices.

Every Opportunity site exists separately from others, with attached documents, milestones, tasks and invoices. This allows you to customize each entry on a site without affecting those on any other site.

You can edit the Opportunity Types and Milestone Types that you've added in your Dalikoo settings within an Opportunity Page without affecting the default types you've created.

Opportunity Sites in-depth

Adding Documents

You can upload documents to your Opportunity Sites easily. Dalikoo includes the dates modified, who modified it, and it allows you to indicate whether the file is a draft or final.

Advanced features include in-depth metadata descriptions, keywords and version control, allowing you to search and identify the newest version of a document with multiple revisions. This is a feature you can explore in How-to guide #

To add a document:

From your Opportunity Site, begin adding documents such as specifications, quotes, timesheets, contracts. Any documents associated with your opportunity can be attached to the opportunity page to manage easily and share with team members.

Click on Add new Document.

Documents					
+ Add new Document					
<input type="checkbox"/>	Name	Title	Modified	<input type="checkbox"/> Modified By	Type Status
<input type="checkbox"/>	Business Case		2/23/2017 3:47 PM	<input type="checkbox"/> Arik Kalininsky	Final
<input type="checkbox"/>	Configurations		2/23/2017 3:47 PM	<input type="checkbox"/> Arik Kalininsky	Final
<input type="checkbox"/>	Functional Planning phased approach	Functional plan	2/23/2017 4:00 PM	<input type="checkbox"/> Arik Kalininsky	Final

You will see a dialogue appear asking you to choose a file. Click Choose File and browse to find the document you want to add on a drive connected to your computer.

You can tell Dalikoo whether to overwrite (save over) an existing version of the document, or create a new version by checking or unchecking the box on the dialogue.

Once you select a document to add, a new dialogue will open, and give you the opportunity to give the document a unique title, and indicate whether it is final or draft.

If these details don't suit your needs you can customize the type of information or meta-data you associate with your documents.

Customizing Document Data

You can customize the type of data associated with your documents by "Adding Columns" under the Documents section of your Opportunity Pages.

Click on Documents in the header of the documents pane.

This will open a settings page where you'll find Create column in the Columns section, as you'll see in the screenshot.

Columns

A column stores information about each document in the document library. Because this document library allow now specified by the content type of the document. The following columns are currently available in this docum

Column (click to edit)	Type
Created	Date and Time
Documents Type	Choice
Modified	Date and Time
Project	Number
Status	Choice
Title	Single line of text
Created By	Person or Group
Modified By	Person or Group
Checked Out To	Person or Group

-
- [Create column](#)
 - [Add from existing site columns](#)
 - [Indexed columns](#)

After clicking Create column, you will be taken to the form shown in the next screenshot. Here, you define the type of column information you would like to use.

It can be a field for text or numerical data, a drop down menu, a check box, and more. The options allow a great amount of flexibility, so take some time to familiarize yourself with the options available.

Dalikoo Customer and Document Management

Settings > Create Column <

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Task Outcome
- External Data
- Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Type each choice on a separate line:

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

Yes No

Default value:

Choice Calculated Value

Add to all content types

Add to default view








Managing milestones


Milestones are deliverables within your projects/opportunities. These come straight from your contract and let you track project timelines. Within milestones, you can list required resources, for example, senior and junior staff hours, and you can indicate which week the phase will begin, and number of weeks allotted. You can also choose to list the cost of the deliverable, if you are billing for each phase.

To create a milestone:

To Add a new Milestone, click Add new Milestone

This will open a form where you enter the details of the milestone.

BROWSE		EDIT	
			
Save	Cancel	Paste	Cut
			
		Copy	Attach File
			
		Spelling	
Commit			
Clipboard		Actions	

Milestone Type	<input type="text" value="Bidding >>> Quoting"/>
Milestones Status *	<input type="text" value="In progress"/>
Sr. Hours	<input type="text" value="2"/>
Jr. Hours	<input type="text" value="5"/>
Start Week *	<input type="text" value="0"/>
Duration (in weeks) *	<input type="text" value="1"/>
Price	<input type="text" value="150"/>
Milestone Date	<input type="text" value="1/1/2017"/> 
Percent Complete	<input type="text" value="25"/>

Milestone Type is determined by the types you have assigned. This may be Quoting as shown in this example.

Milestone Status allows you to indicate progress towards completing the milestone. Options include: Created, In Progress, Completed, or Cancelled.

Sr. Hours lets you estimate the number of senior staff hours required to complete the milestone.

Jr. Hours lets you estimate the number of junior staff hours required to complete the milestone.

Start Week is a whole number, indicating when in the Opportunity or Project this milestone will take effect. In this example, Quoting will take place before the project begins, so it is in Week 0.

Duration is in weeks and will allow you to estimate how long the milestone should take to complete.

If you bill at intervals of the work being completed, you can set a price for this stage. For example, if you charge \$150 to quote for work, you would include that in the milestone.

Finally, you can track the status of the milestone in terms of percent complete in increments of 25%.

Customizing Milestones

In much the same way that you can customize the information associated with your documents, you can customize milestones by clicking on the word Milestones in the pane header.

You can create new columns, and edit existing columns. For example, if your business has two employees (and their names are Dan and Mary), it might make more sense to have “Dan’s Hours” and “Mary’s Hours” instead of Sr. Hours and Jr. Hours.

Click right on the column name if you want to edit a particular column. For Example, click Sr. Hours, and change that to Mary’s Hours.

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Milestone Title	Single line of text	
Modified	Date and Time	
Created	Date and Time	
Milestone Type	Choice	
Milestones Status	Choice	✓
Sr. Hours	Number	
Jr. Hours	Number	
Start Week	Number	✓
Duration (in weeks)	Number	✓
Price	Currency	
Project	Number	
Milestone Date	Date and Time	
Milestone Title	Single line of text	
PrXCompleted	Calculated (calculation based on other columns)	
PrXToDo	Calculated (calculation based on other columns)	
Percent Complete	Choice	
HrsLeft	Calculated (calculation based on other columns)	
HrsComplete	Calculated (calculation based on other columns)	
Created By	Person or Group	
Modified By	Person or Group	

-
- [Create column](#)
 - [Add from existing site columns](#)
 - [Column ordering](#)
 - [Indexed columns](#)

This is very similar to the process you are already familiar with from adding/customizing the columns and data associated with documents. The field used to add data columns to your milestones is identical to the one for Documents above.

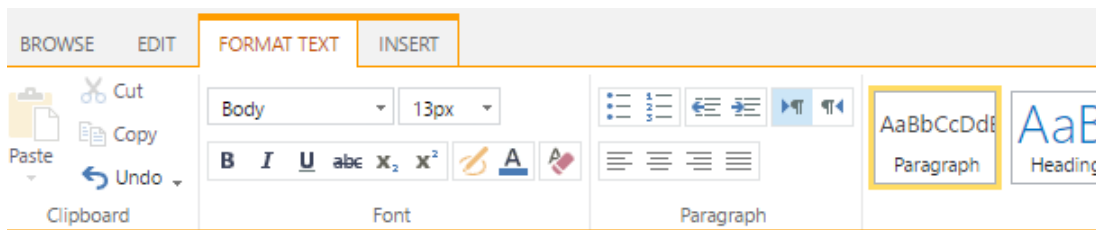
Assigning tasks



Tasks allow milestones to be broken into manageable sections and assigned to team members. You can name and prioritize tasks, and track their status and percent complete.

To assign a task

Assign a Task by clicking Add new Task.

This will open a form to input the details of the task and assign it to a member of your team who is working on a task.



Task Name *	<input type="text" value="Site Visit"/>
Priority	<input type="text" value="(2) Normal"/>
Task Status	<input type="text" value="Not Started"/>
% Complete	<input type="text" value="0"/> %
Assigned To	<input type="text" value="Gerry"/>
Description	<input type="text" value="Gerry to visit client and determine their needs and develop a quote"/>
Start Date	<input type="text" value="1/3/2017"/> 
Due Date	<input type="text" value="1/5/2017"/> 
Milestone	<input type="text" value="Bidding >>> Quoting"/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

In this example, it will be connected to the Quoting example we used in creating a new milestone. This will be a site visit.

Priority is Normal, but it may be a high or low priority task, based on your requirements.

This particular task hasn't started yet, but you may indicate that it's In Progress, Complete, Deferred, or Waiting on someone else to complete another task that is connected. In the case of the site visit, it could be waiting on the client to provide a window of time to visit them.

You can indicate percentage complete by typing a percentage into the field.

In this example we've assigned the task to Gerry. Names will appear based on who on your team is working in Dalikoo.

Description can be as detailed as necessary for a given task. It may include client contacts, or vendor information, depending upon the requirements of the task.

Start date is when the task should be initiated.

Due date is when the task should be completed.

Finally, Milestone allows you to connect the task to a milestone within the Opportunity or Project. This will allow you to use the Gantt Report to track milestones and tasks against project timelines.

If the task is not associated with an existing milestone, you may leave it blank.

When you're finished, click save to add the task to your Opportunity page.

Customizing Tasks

You've already explored customizing the types of data associated with your Documents and Milestones. Tasks are no different and the process is the same.

Click the word Tasks on the Task pane header.

You'll immediately recognize the settings page from the previous two. Click a Task name under columns to edit the column. Click Create columns below the column list to create a new field to associate data with your Task.









Attaching invoices to specific milestones

While Dalikoo does not generate your invoices for you, it helps you track which invoices need to be sent, which have been sent, and which you have received payment for. Later on, when we look at Reporting in guide #6, you'll see how the invoices you add to your Opportunity pages appear in your reports.

How to add an invoice:


Adding an invoice allows you to track the status of invoices associated with your Project or Opportunity.

By clicking Add new Invoice on your Opportunity page, you will be taken to a form to input details about an invoice. This lets you manage invoice status – such as when it is scheduled to be issued.

BROWSE		EDIT		
				
Save	Cancel	Paste	Cut	Attach File
				
		Copy	Spelling	Spelling
Commit		Clipboard		
		Actions		

Invoice Number *

Description

Invoice Date * 

Invoice Status * ▼

Invoice Amount

Expenses Amount

Notes

Milestone ▼

You must include the Invoice Number, due date, and status.

The Invoice Number should match that of the generated invoice.

Description is optional and should describe what the invoice is covering.

Date is the when the invoice will be, or was generated.

Status allows you to say whether the invoice was requested by the client, sent, paid, etc.

Invoice Amount is the dollar amount on the invoice – pretty simple.

Expenses amount would be the cost of completing the work – say travel expenses associated with performing the site visit.

Notes allow you to input any additional information you would like to save with the invoice tracking.

Finally, you can associate the invoice with a particular milestone, such as Quoting.

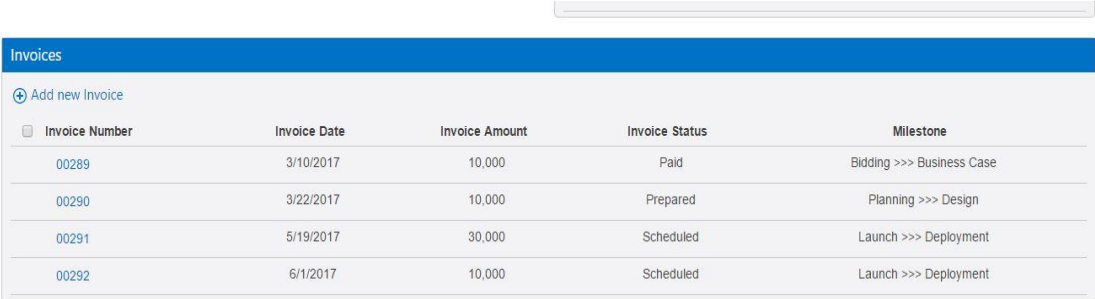
Customize your Invoice Views

Finally, just as you could with Documents, Milestones and Tasks, you can customize your Invoice tracking the same way.

Begin by clicking on the word Invoices on the Invoice Pane header.

Under settings, click the column name to edit an existing column, or Add Column to create a new data field to associate with your invoices.

The forms are familiar to you by now.



Invoices				
+ Add new Invoice				
<input type="checkbox"/> Invoice Number	Invoice Date	Invoice Amount	Invoice Status	Milestone
00289	3/10/2017	10,000	Paid	Bidding >>> Business Case
00290	3/22/2017	10,000	Prepared	Planning >>> Design
00291	5/19/2017	30,000	Scheduled	Launch >>> Deployment
00292	6/1/2017	10,000	Scheduled	Launch >>> Deployment