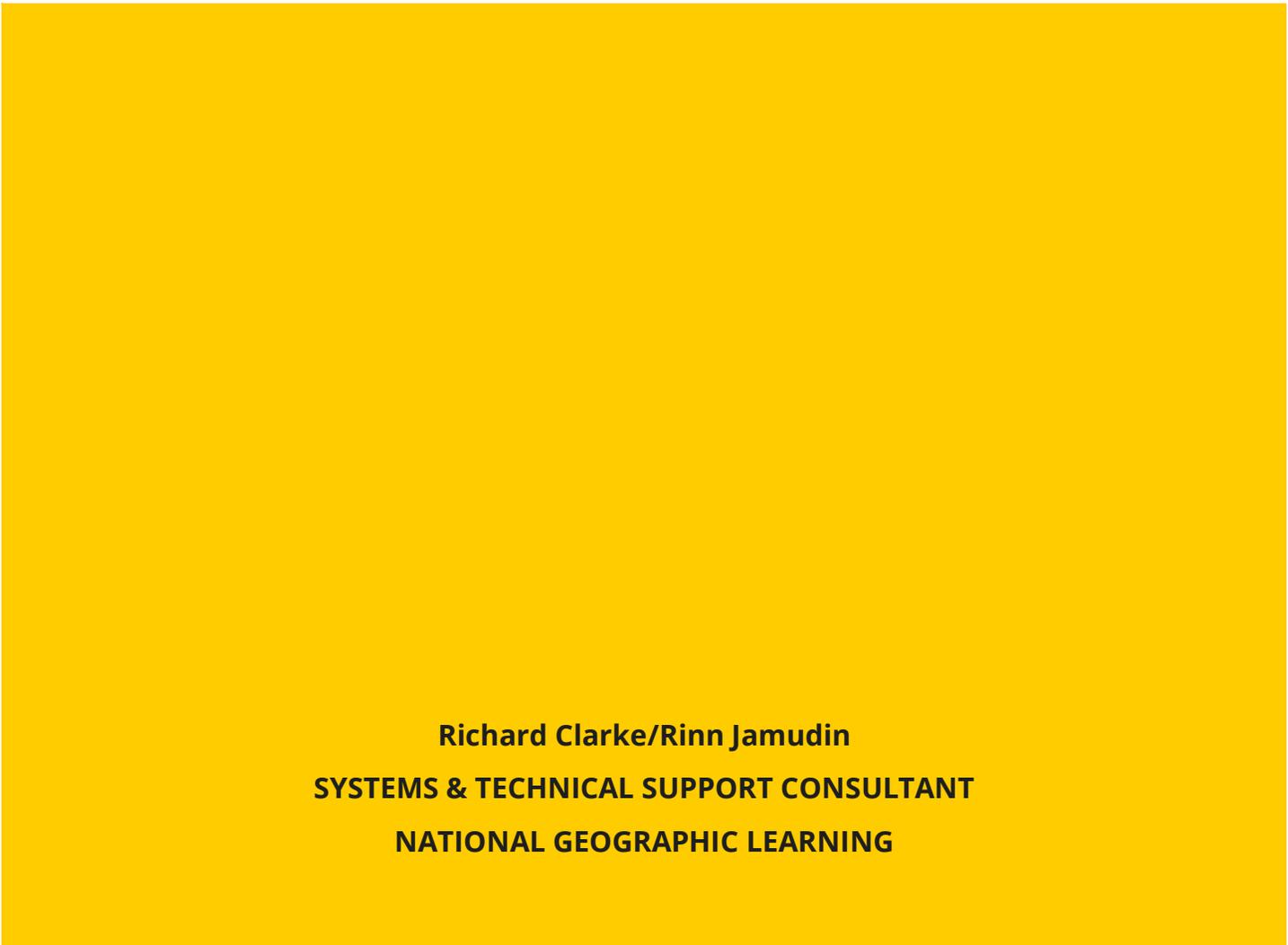




# MAGELLAN 2 ASIA ELT USER GUIDE

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**NATIONAL GEOGRAPHIC LEARNING**



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## Views, Bars & Headers

There are three (3) groups of Magellan views:

View	Description
Core	A collection of views that represent information shared across the user's territory. For example, a list of all accounts, or all samples regardless of account association.
Account	A collection of views specific to the selected account.
Contact	A collection of views specific to the selected contact.

### Core Views

Initially the Core view is labeled '**Home**', however once a core view is selected the button label will change to better describe what is being displayed.

The screenshot shows the top navigation bar of the Magellan application. It includes a 'Home' button with a compass icon, and three status indicators: 'No account selected' with a building icon, 'No course selected' with a telescope icon, and 'No contact' with a person icon. To the right are icons for search, notifications (with a red '0'), a menu, settings, and chat. Below the navigation bar is a 'User Preferences' section with two input fields: 'SESSION\* Default Requested SHIP DATE:' and 'Default DECISION DATE:'. A red note below the first field reads '\*Session default only for this sampling session\*'. The 'Home' button is highlighted in blue.

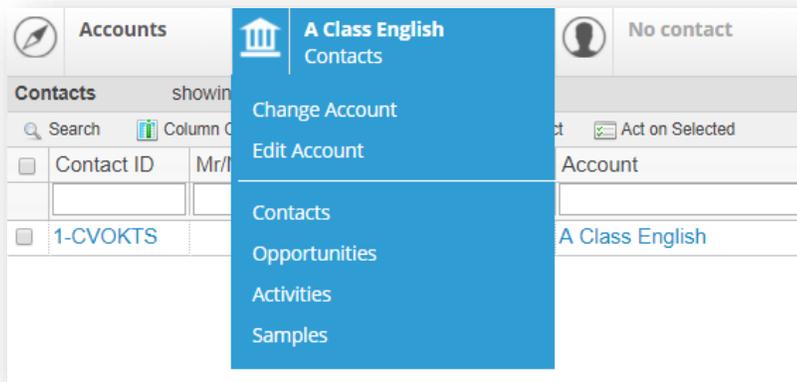
Once your mouse is positioned over the button an expanded list of views is presented: -

This screenshot shows the 'Home' button expanded into a vertical menu. The menu items are: Home, Accounts, Samples, Contacts, Opportunities, Activities, Catalog, Resources, Needs Action, Alert Center, and Log Off. The 'Home' item is currently selected and highlighted in blue. In the background, a pie chart and a bar chart are visible, representing data visualizations.

- **Accounts** – List of Accounts associated with the User.
- **Samples** – Presents a Search bar for Users Sample history.
- **Contacts** – List of Contacts associated with the Users Accounts.
- **Opportunities** – List of Opportunities associated with the User.
- **Catalog** – Takes the User through to the NGL Catalog

## Account Views

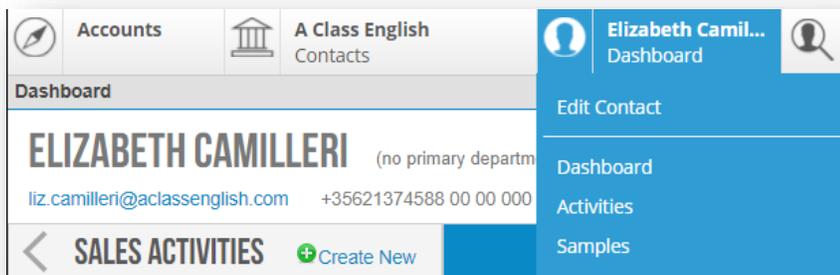
Additional account views may be available by hovering the cursor over on the left-hand side of the Accounts tab...



- **Change Account** – This returns the User to their list of Accounts to select a new one.
- **Edit Account** – This takes the User through to the Edit Account screen. Please note, Sales Reps can only change the Key Account flag within this screen.
- **Contacts** – List of Contacts associated with the Accounts.
- **Opportunities** – List of Opportunities associated with the Account.
- **Samples** – List of Samples relating to the Account.

## Contact Views

Additional account views may be available by hovering the cursor over on the left-hand side of the Contacts tab...



- **Edit Contact** – This takes the User through to the Edit Contact screen.
- **Dashboard** – Takes you back to the Contact Dashboard.
- **Samples** – List of Samples raised against the Contact.

## BARS

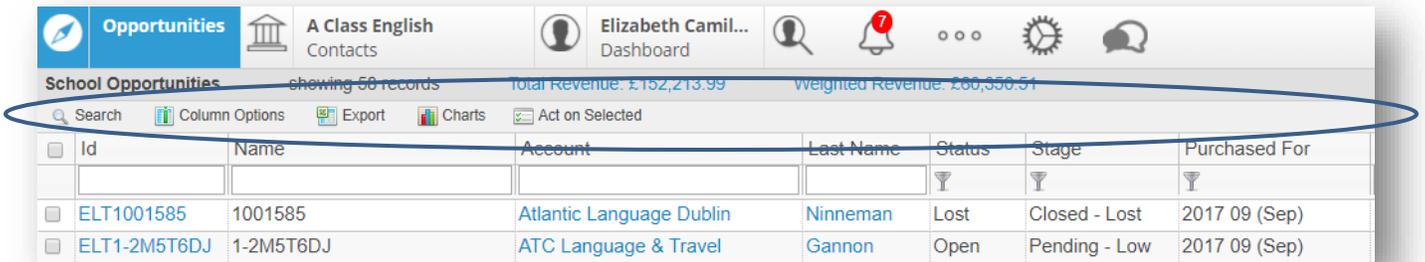
### Summary Bar

The appearance of the summary bar will vary depending on the view selected. For example, when the Opportunities view is selected a summary of total revenue and weighted revenue appears. As filters are applied the value in the summary bar will adjust to reflect the filtered data.



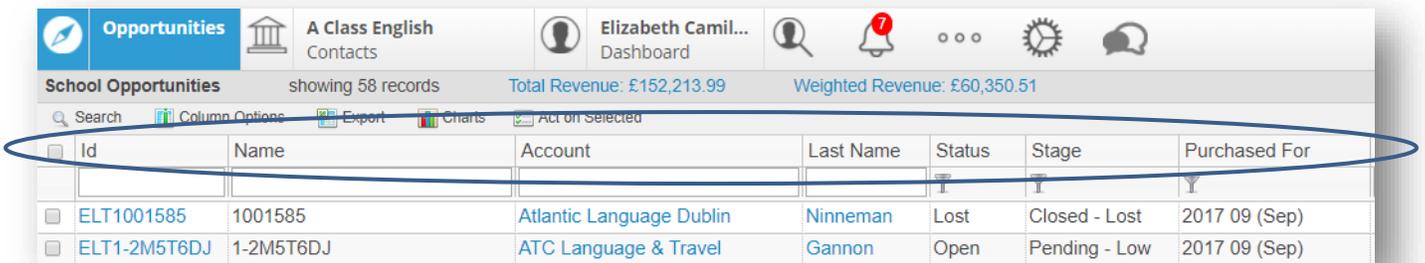
### Action Bar

Frequent tasks such as searching and column adjustments can be completed in the Action Bar. If there are tasks specific to a view (like creating a new Contact record in the Contact view) then appropriate actions will be listed to the right of the Column Options action.



## HEADERS

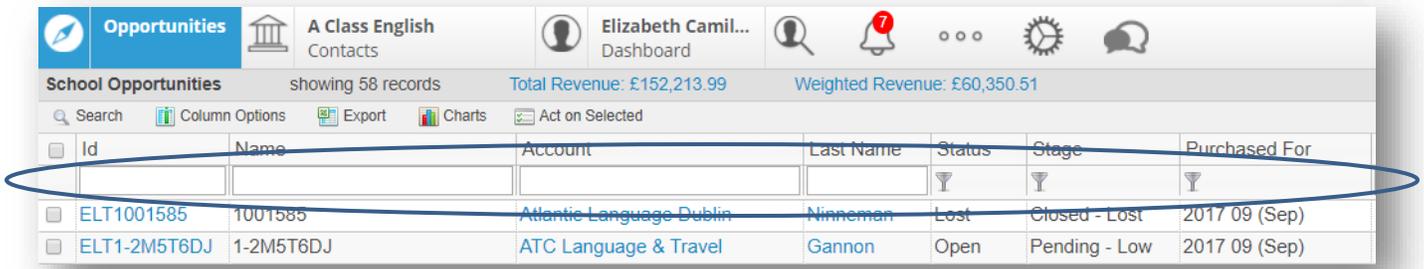
### Column Headers



The column headers not only label the columns of data but, when clicked, will allow you to execute basic sort ascending and descending commands. If you see a blue triangle to the immediate right of any column label, then you know that this column is currently sorted. An arrow pointing down represents a descending sort and an arrow pointing up represents an ascending sort.

Like other software programs, the column header can also be used when adjusting column order by using the click and drag method.

## Filter Bar



Filtering takes an existing full list, and removes items based on criteria that match/don't match. You are starting with results and then subtracting. For example, you may have a full list of Opportunities and you apply a filter to only show those that are in an Open stage so you can see only those opportunities you need to actively work with.

Common filter criteria include:

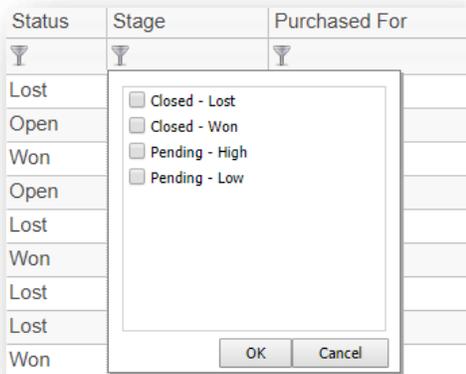
Criteria	Use
=	Equal to
<	Less than
>	Greater than
<>	Not equal to
<=	Less than or equal to
>=	Greater than or equal to
IS NULL	Searches for blank fields
IS NOT NULL	Searches for nonblank fields

### Multi-Value Filter

The funnel icon (pictured below) represents a field that can contain multiple values.



Once selected, you will see all of the options available for the selected field. Each will have different choices. Use the check boxes to select one or more values and then click 'OK' to apply the filter.



**GREEN** - shows you have applied in a filter.

### Clear Filter

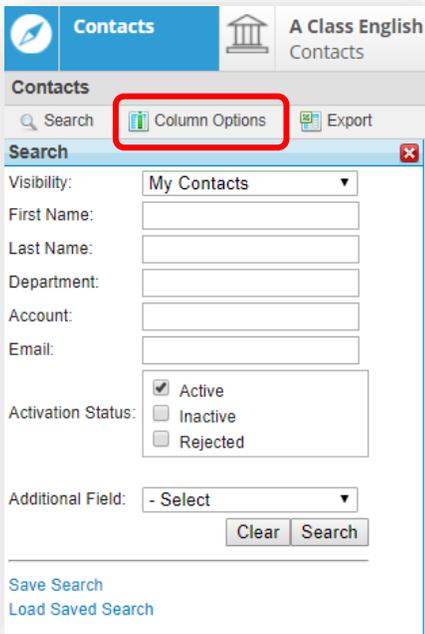
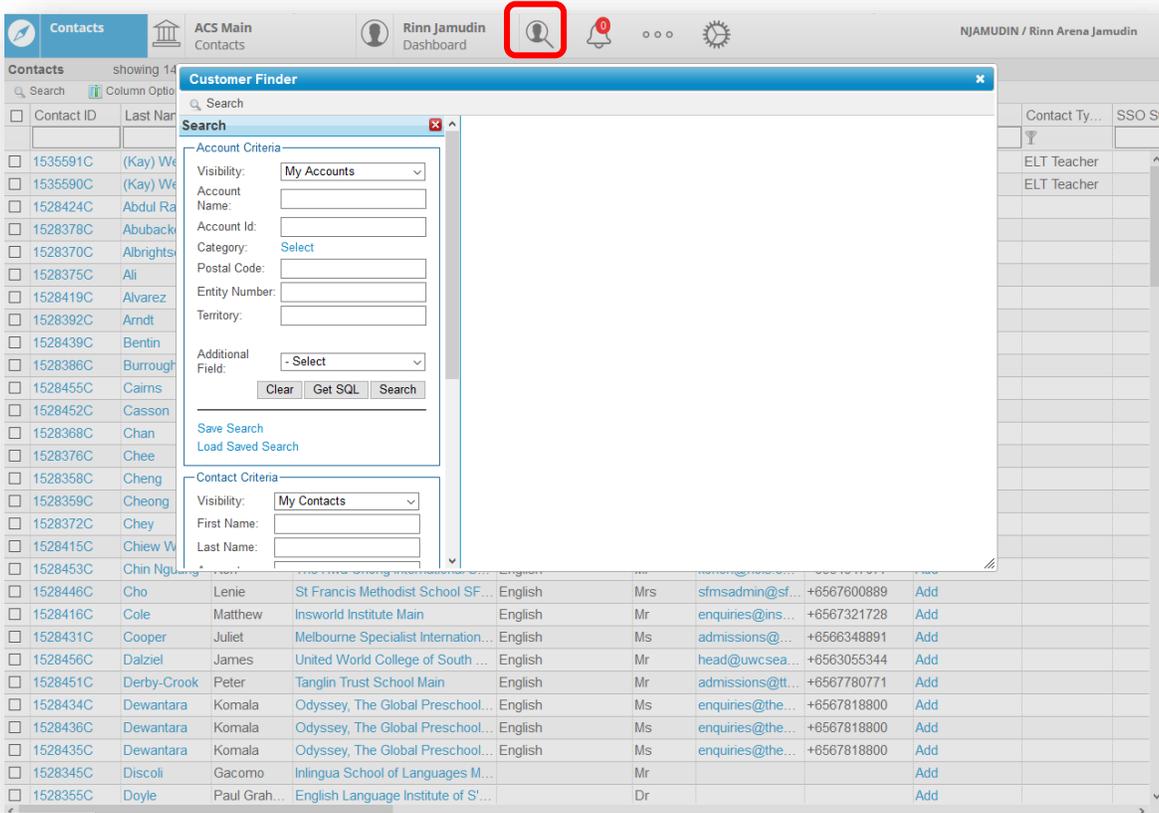
Opportunities		A Class English Contacts		Elizabeth Camil... Dashboard		7		...		...	
<b>School Opportunities</b>		showing 12 of 58 records after filtering		Clear Filter		Total Revenue: £38,630.64		Weighted Revenue: £9,666.16			
Search		Column Options		Export		Charts		Act on Selected			
Id	Name	Account	Last Name	Status	Stage	Purchased For					
<input type="checkbox"/>											
<input type="checkbox"/>	ELT1-2M5T6DJ	1-2M5T6DJ	ATC Language & Travel	Gannon	Open	Pending - Low	2017 09 (Sep)				
<input type="checkbox"/>	ELT1-2HPC3BV	1-2HPC3BV	Brasshouse Centre	Henderson	Open	Pending - Low	2017 09 (Sep)				
<input type="checkbox"/>	ELT1-2JDCVOM	1-2JDCVOM	English in York	Neale	Open	Pending - Low	2017 09 (Sep)				

The 'Clear Filter' command is located in the Summary Bar. Although it is easy to manually delete the values you have applied in a filter, you may have applied a more complex filter and use of the Clear Filter function ensures that every column filter has been removed. Additionally, it can be handy to determine, at a glance, whether a filter has been applied to a list.

### Search

Search takes a blank slate and adds to it based on criteria that match/don't match. You are starting with no results and displaying only relevant ones. For example, you want to find a contact but are not sure if the spelling of the contact's first name is 'Carl' or 'Karl'. In a search you can input 'Carl or Karl' as your criteria and get results such as 'Karl', 'Carl', 'Carla', 'Karla', and 'Carlton'.

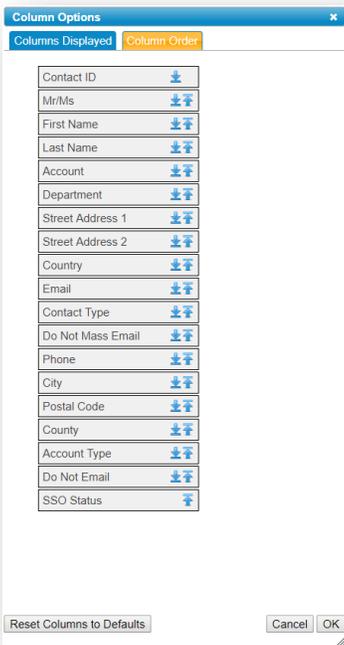
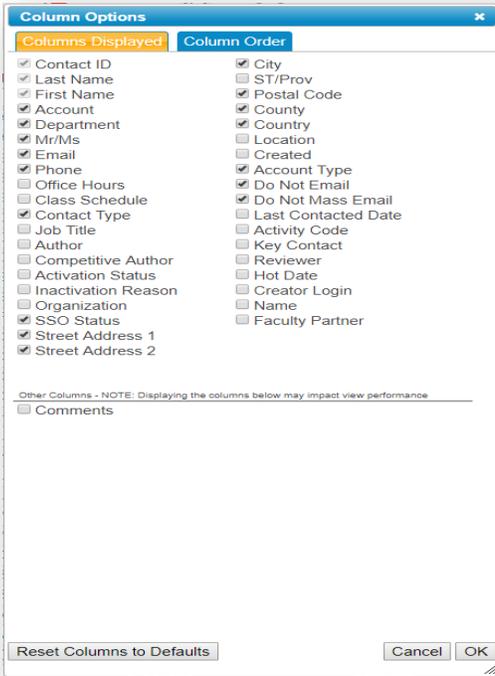
- Search fields will vary depending on the view you are searching on.
- Search criteria is not case-sensitive.
- Search criteria is held until a new search is performed or the 'Clear' button is selected.
- Searches you execute frequently can be saved for future use.



## Column Options

You can add, remove, and rearrange columns in a list to suit your preferences. Your changes are saved permanently. The 'Column Options' command is only located in the Action Bar.

Those columns with a check box that appears grey and cannot be selected are columns that are required in the view you have selected.



Click	To
	Move the selected column to the top of the list.
	Move the selected column up/down one position in the list.
	Move the selected column to the bottom of the list.

## Adjust Columns Displayed



1. Navigate to the list you want to adjust columns on.
2. Click the '**Column Order**' command on the Action Bar.
3. Adjust the columns as necessary.
4. Click the '**OK**' command button.

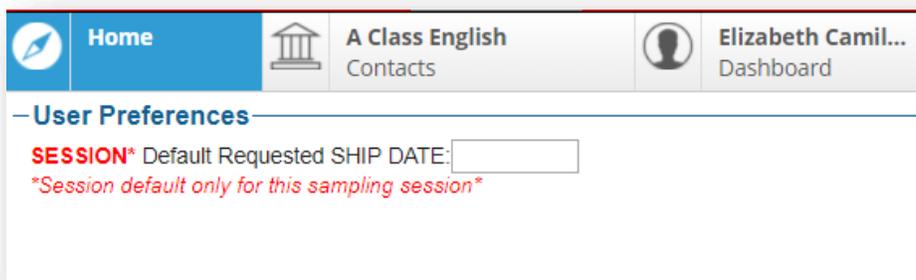
## Full Screen Visibility

In order to maximize the Magellan screen, **press the F11 key** on your keyboard. You will only see the Magellan application; other Chrome features will disappear from view. In order to return to the standard Chrome view you will have **to press the F11 key again**.

## Home View

### Default Ship Date

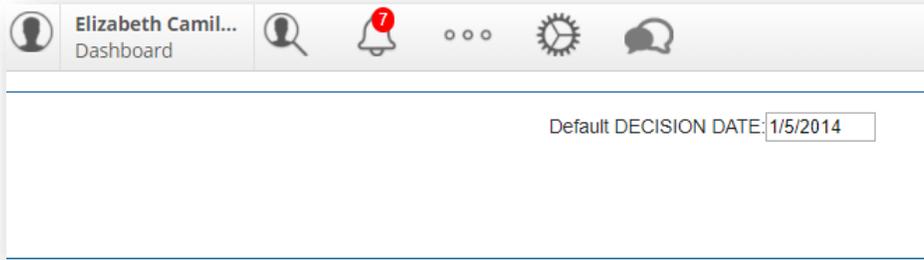
The Default Requested Ship Date is adjusted on the Core Home View. This value is only valid for the current sampling session. Once you close the Chrome window the value is deleted, and you will have to re-enter the date when you next login to Magellan. Completing this field is not required; rather offered as a convenience.



The screenshot shows the top navigation bar with 'Home', 'A Class English Contacts', and 'Elizabeth Camil... Dashboard'. Below this is the 'User Preferences' section, which includes a field for 'SESSION\* Default Requested SHIP DATE:' with an empty input box. A red note below the field states '\*Session default only for this sampling session\*'.

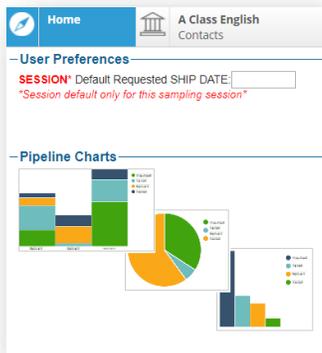
## Default Decision Date

The default Decision Date is adjusted on the Core Home View. This field value is maintained from session to session. Be sure to adjust this value as appropriate.



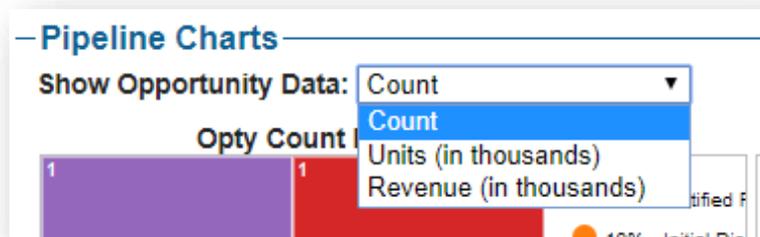
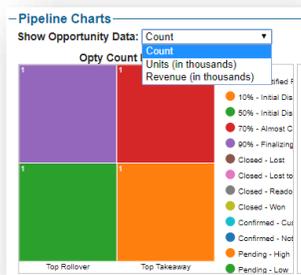
## Pipeline Charts

The pipeline charts available on the Core Home View allow the user to see **opportunity data** across their territory in a graphical format.

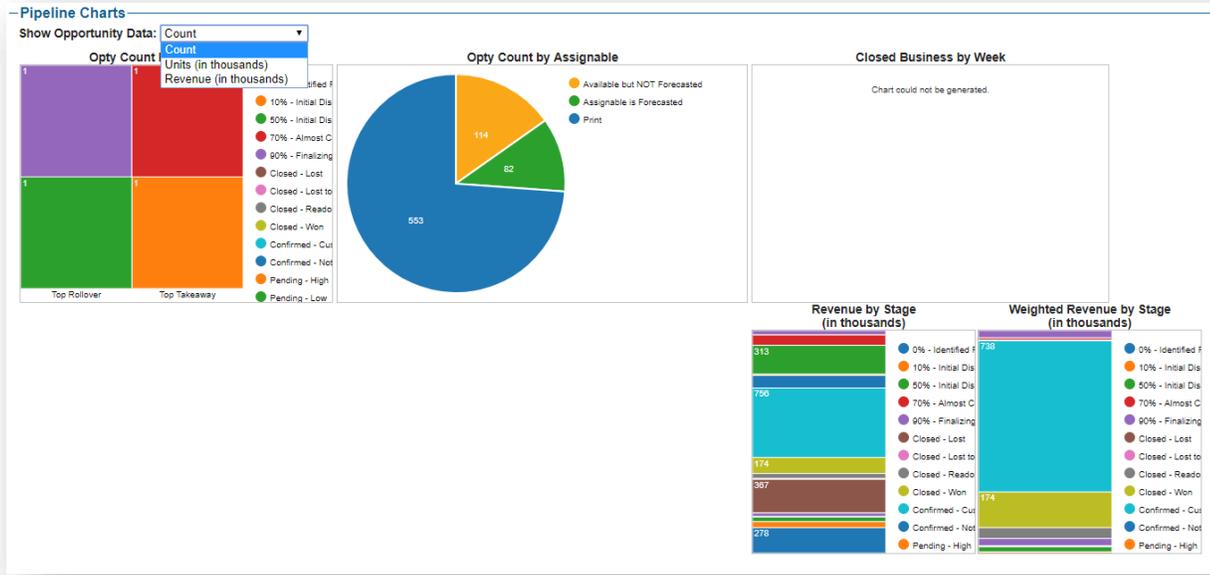


If you click anywhere on the charts that appear, more details are displayed. The drop-down list box at the top of the charts section allows you to view data by:

- Opportunity Count (default view)
- Units (in thousands)
- Revenue (in thousands)



This view is not interactive; simply informational. In order to utilize an interactive pipeline chart you must select an account and its opportunity view or select the Opportunity Core View.



## Catalog

The catalog provides two different ways to view products; Browse, Search, Contact Courses.

### Browse

Selecting a Discipline and Course is the first step to viewing products. All products that meet your selected criteria are displayed at the bottom of the catalog.

**Browse** | **ESL General Engl** | **> Middle/High School** | Search | Contact Courses | Act on Selected

**(Middle/High School): 32 product(s)** | Resources

**2018**

Product	Author	1st Edition	Availability
Perspectives 2: Student Book/Online Workbook Package, Printed Access Code	Dellar/Walkley	21/2/2018	21/2/2018
Perspectives 3: Student Book/Online Workbook Package, Printed Access Code	Jeffries	22/2/2018	22/2/2018
Perspectives 4: Student Book/Online Workbook Package, Printed Access Code	Lansford	21/2/2018	21/2/2018
Impact Foundation (British English)	Stannett	23/3/2017	23/3/2017
Impact Foundation	Stannett/Kang Shin/C	8/7/2017	7/7/2017

**2017 and Older**

Product	Author	1st Edition	Availability
Impact 3 (British English)	Fast/Kang Shin/Crand	27/7/2016	11/7/2016
Impact 4	Fast/Kang Shin/Crand	19/4/2016	20/4/2016
Impact 1	Koustaff/Kang Shin/C	16/5/2016	17/5/2016
Impact 4 (British English)	Koustaff/Kang Shin/C	28/7/2016	11/7/2016
Impact 2 (British English)	Pinkley/Kang Shin/Cr	21/9/2016	21/9/2016

## Search

If you are interested in searching for a particular Author, Title or ISBN (or even just part) your search results will appear at the bottom of the pop-up grouped by copyright year.

The screenshot shows a catalog search interface. At the top, there is a search bar with the text "Search Title: 21st centu" and "Author: " and "ISBN: ". The search bar is highlighted with a red box. Below the search bar, there is a "Go" button and "Contact Courses" and "Act on Selected" options. The search results are displayed in a grid format, grouped by copyright year. The first group is for the year 2018, showing one product: "21ST CENTURY CREATIVE THINKING, LISTENING AND SPEAKING" by DOUGLAS/TED, published by CENGAGE Learning, 1st edition, available 9/7/2018. The second group is for the year 2017 and Older, showing ten products. Each product card includes the author(s), publisher, edition, availability date, and a "View | Select" link.

Author(s)	Publisher	Edition	Availability Date	Product Title
DOUGLAS/TED	CENGAGE Learning	1st edition	9/7/2018	21ST CENTURY CREATIVE THINKING, LISTENING AND SPEAKING
Baker, Blass	CENGAGE Learning	1st edition	2/9/2016	21st Century Communication 1: Listening, Speaking and Critical Thinking
Baker/Blass	CENGAGE Learning	1st edition	17/11/2016	21st Century Communication 1: Listening, Speaking and Critical Thinking, Printed Ac.
Blass/Baker	CENGAGE Learning	1st edition	2/9/2016	21st Century Communication 1: Listening, Speaking and Critical Thinking, Student Book with Online Wo
Blass/Baker	CENGAGE Learning	1st edition	2/9/2016	21st Century Communication 2: Listening, Speaking and Critical Thinking, Student Book with Online Wo
Blass/Baker	CENGAGE Learning	1st edition	8/11/2016	21st Century Communication 3: Listening, Speaking and Critical Thinking, Student Book with Online Wo
Blass/Baker	CENGAGE Learning	1st edition	16/11/2016	21st Century Communication 4: Listening, Speaking and Critical Thinking, Student Book with Online Wo
Blass/Baker	CENGAGE Learning	1st edition	29/11/2017	21st Century Communication 4: Classroom Presentation Tool USB
Blass/Baker	CENGAGE Learning	1st edition	1/12/2017	21st Century Communication 2: Classroom Presentation Tool USB
Blass/Baker	CENGAGE Learning	1st edition	1/12/2017	21st Century Communication 1: Classroom Presentation Tool USB
Blass/Baker	CENGAGE Learning	1st edition	1/12/2017	21st Century Communication 3: Classroom Presentation Tool USB

The screenshot shows a catalog search interface. At the top, there is a search bar with the text "Search Title: " and "Author: " and "ISBN: ". The search bar is highlighted with a red box. Below the search bar, there is a "Go" button and "Contact Courses" and "Act on Selected" options. The search results are displayed as "No products were found". A pop-up window titled "Multi-ISBN Search" is open, showing instructions: "Enter ISBNs separated by commas, spaces, new lines or tabs. Dashes will be ignored." Below the instructions, there is a text input field containing the following ISBNs: 9781305089556, 9781305089549, 9781305089532, and 9781305089525. At the bottom of the pop-up, there are "Close", "Clear", and "Search" buttons.

The result by ISBN filter.

The screenshot shows a web interface titled 'Catalog'. At the top, there is a search bar with fields for 'Title', 'Author', and 'ISBN', followed by a 'Go' button. To the right of the search bar are two buttons: 'Contact Courses' and 'Act on Selected'. Below the search bar, a summary bar indicates '(- Clusters / Courses): 4 product(s)'. Underneath, a section titled '2015 and Older' displays four product cards. Each card includes a book cover, the author name, the edition number, the date it was available, and a 'View | Select' link at the bottom.

Author	Product Title	2nd edition Avail:	2nd edition Avail:
Chase/Johannsen	World English 3: Student Book/Online Workbook Package	12/11/2014 14/11/2014	
Chase/Milner	World English 2: Student Book/Online Workbook Package	7/11/2014 14/11/2014	
Chase/Milner/Johanns	World English Intro: Student Book/Online Workbook Package	23/9/2014 29/9/2014	
Chase/Milner/Johanns	World English 1: Student Book/Online Workbook Package	22/9/2014 19/9/2014	

### Act on Selected

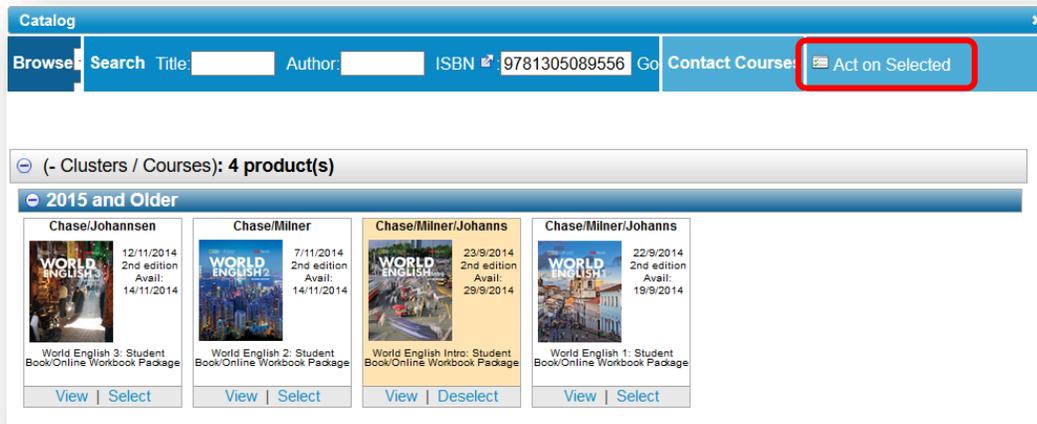
Any product can be 'opened' so that product detail is available in its own pop-up window. However, there is a 'Select' link on every product. Once selected, the link is renamed to 'Unselect'. The purpose of this link is to allow you to select multiple products (without using the Ctrl or Select keys on your keyboard) and perform an action based on your selection.



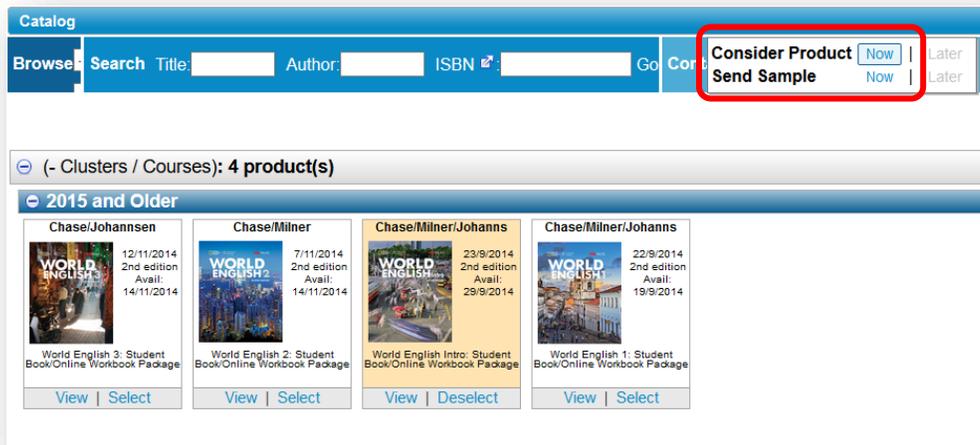
1. From the contact dashboard, select the '**Catalog**' Contact View.
2. Use the '**Select**' links to select one or more products.

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Select' link in the bottom right corner of the third product card (World English Intro).

3. Click the **'Act on Selected'** option.

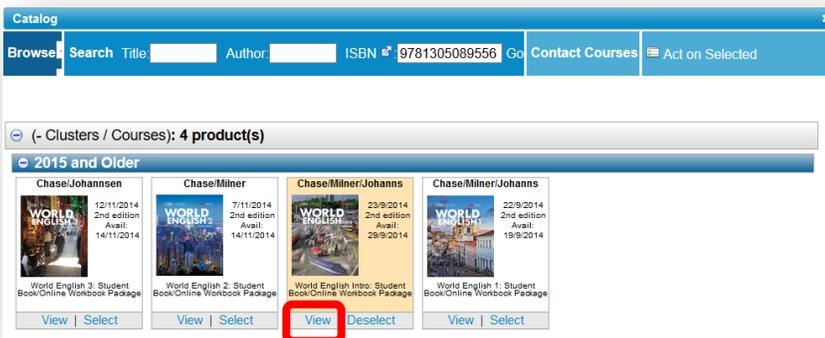


4. Click the **'Now'** link to either create a new opportunity or sample.

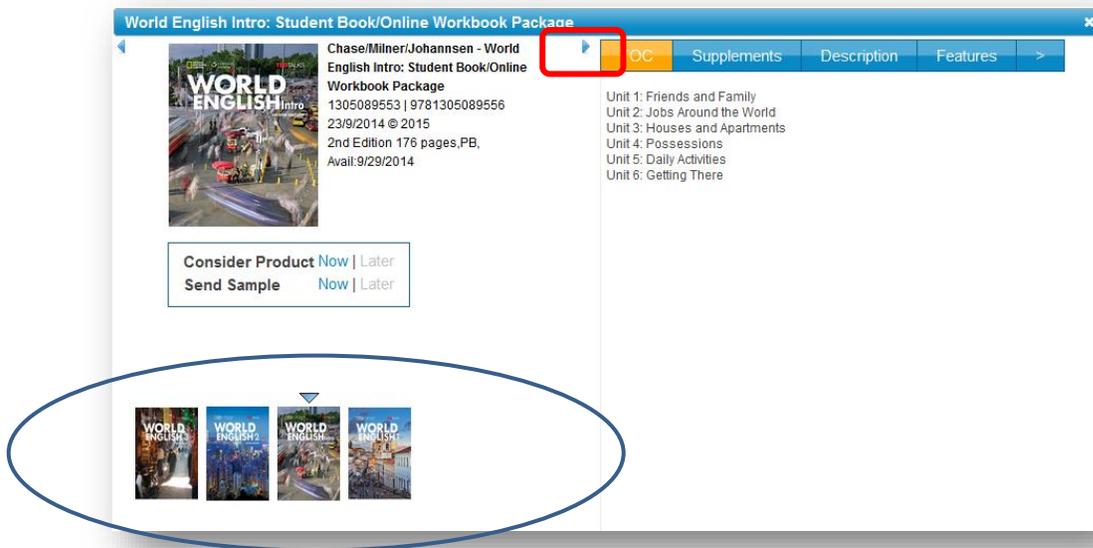


### Product Navigation

Click **View** to open to the product details. There are two (2) ways to do so. You can click the arrow located to the immediate left of the TOC header to proceed to the next course product:

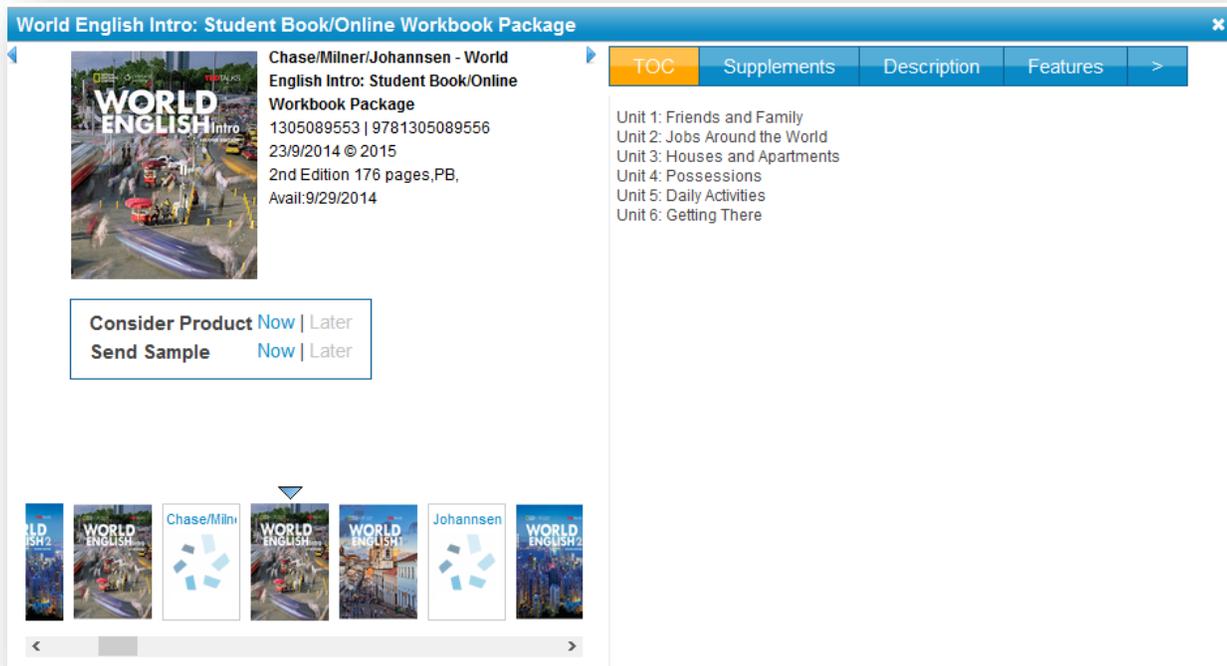


Or click on any piece of cover art displayed at the bottom of the products details popup.



### Product Details

The first product detail listed for every product is the TOC however there are many other product attributes available via the buttons at the top of the pop-up. 'Hidden' buttons can be exposed by clicking the '>' on the right side of the pop-up.



## CONTACTS

Each contact in Magellan is uniquely identified by a value in the Contact ID column. This field also serves as a hyperlink to edit basic contact information like name, email, office hours, shipping address, and etcetera.

Contact ID	Mr/Ms	First Name	Last Name	Account
1234127C	Dr.	Sophie	Alkhaled	University of Lancaster
1045454C	Dr.	Richard	Allmendinger	University of Manchester
1265527C	Mr.	David	Brien	Dublin Institute of Technology
1-23N1448	Ms.	Paula	Browne	Bury College

## Edit Contact Details

Salutation: [dropdown]  
Name: Elizabeth Camilleri  
Email: liz.camilleri@aclassenglish.com  
Cell Phone: [text]  
Work Phone: +35621374588  
Room Location: [text]  
Comments/Current Product: [text area]

Last Contacted Date: -(not set)-  
Contact Type: ELT Decision Maker  
Job Title: [text]  
Roles:  Author,  Reviewer,  Competitive Author,  Pilot User,  Faculty Partner,  Executive Contact,  System Administrator  
Office Hours: n/a  
Class Schedule: n/a  
Buttons: Save, Edit Office Hours/Class Schedule, Add to Daily Plan

Department Info | Contact Status | Details | Preferences | Editorial | Online Access | Addresses | Attachments

Primary Department: Account Depts  
ELT Department  
ESOL

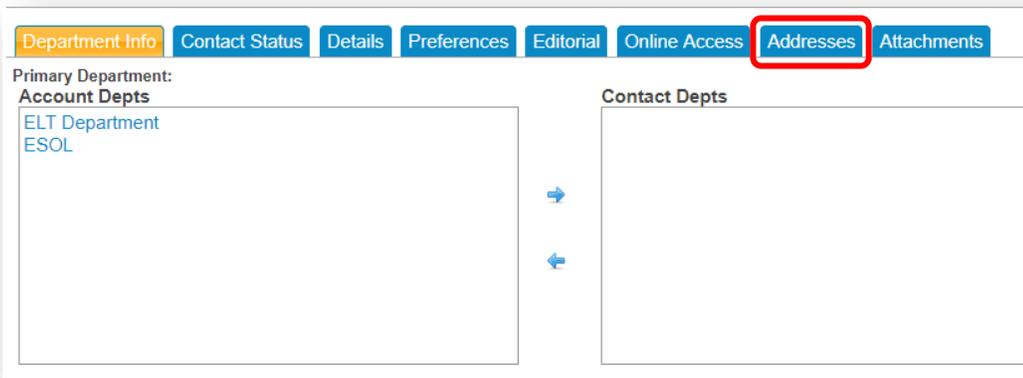
Contact Depts

The most common fields to edit for a contact are located at the top of the Edit Contact pop-up. Other important fields are located on a series of tabs at the bottom of the pop-up. You can use the shuttle box feature to associate/disassociate contacts to departments on the 'Department Info' tab, or adjust e-mail preferences on the 'Preferences' tab, and etcetera.

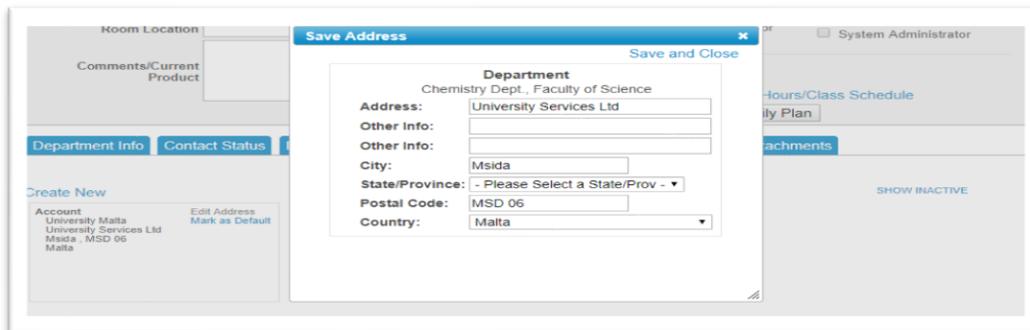
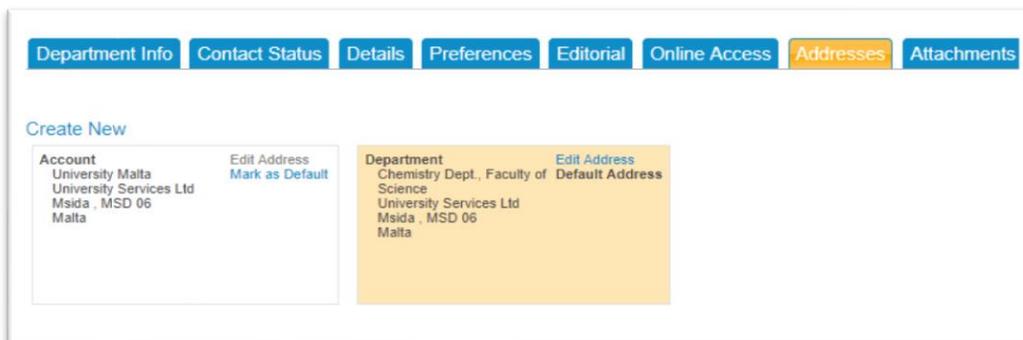
Once you have completed editing a contact record click the 'Save' command at the top of the pop-up. You will not be prompted to save if you simply click the 'X' to close the pop-up and your changes will be lost.

## Addressing

All addresses associated with a contact appear on the 'Addresses' tab in a contact record.



Each address is represented in a business card style. Editable addresses have an 'Edit Address' hyperlink on the card.



### Add a New Contact Address

1. Locate the contact you want to edit.
2. Click the '**Contact ID**' for that contact to display the Edit Contact pop-up.
3. Click the '**Addresses**' tab.
4. Click the '**Create New**' link at the top of the list of current addresses.
5. Enter all address information and click the '**Save and Close**' link.

## View Contact Dashboard

Each contact's last name is a hyperlink to their dashboard.

Contact ID	Last Name	First Name	Account	Department	Mr/Ms	Email	Phone
1708625C	<a href="#">Jamudin</a>	Rinn	ACS Main	English	Miss	rinnarena.jamu...	64101287
1708621C	Jamudin	Rinn	Harry Technology MIS Campus	MIS	Miss	rinnarena.jamu...	64101287

You will see the currently selected contact name displayed above the Contact views. Other key information is listed on the relevant tabs.

Contacts
ACS Main Contacts
Rinn Jamudin Dashboard

NJAMUDIN / Rinn Arena Jamudin

**Dashboard**

**Rinn Jamudin** [Edit](#) [Add Note](#) [Priority](#)  
[rinnarena.jamudin@cengage.com](mailto:rinnarena.jamudin@cengage.com) | 64101287 | Office: English | Office Hours: n/a  
[SSO: Create SSO Account](#)

**Active Opportunities**  
[Show All Opportunities](#) | [Create New Opty/Sample](#)

**Sample TESTING**

**Published:** No  
**Stage:** Pending - Low  
**Revenue:** \$383.05  
**Units:** 26  
**Sales Period:** 2018 05 (May)  
**Follow-up:**  
 26 item(s) in opty  
[Edit/Sample](#)  
**Opty Id:** 3536359

**21st Century Communication 1: Listening, Speaking and Critical Thinking**  
**1st Edition 1st Edition**  
 Baker, Blass  
 © 2017  
 In Print / 2/9/2016  
 9781305945920

**Life Beginner Student's Book with App Code**  
**2nd Edition 2nd Edition**  
 Stephenson/Dummett  
 /Hughes  
 © 2019  
 In Print / 1/1/2018  
 9781337285285

**KEYWORDS FOR JAPAN TODAY**  
**Edition Edition**  
 STAPLETON  
 © 2008  
 In Print / 31/12/2007  
 9784863120433

**July Semester**

**Published:** No  
**Stage:** Pending - Medium  
**Revenue:** \$383.35  
**Units:** 18  
**Sales Period:** 2019 03 (Mar)  
**Follow-up:** 23/2/2019  
 18 item(s) in opty  
[Edit/Sample](#)  
**Opty Id:** 3532637

**21st Century Reading 2: Creative Thinking and Reading with TED Talks**  
**1st Edition 1st Edition**  
 Longshaw/Blass  
 /Vargo/Yeates  
 © 2015  
 In Print / 19/2/2015  
 9781305265707

**Life 1 with Web App**  
**2nd Edition 2nd Edition**  
 Hughes/Dummett  
 /Stephenson  
 © 2019  
 In Print / 12/6/2018  
 9781337905626

**21st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Workbook**  
**1st Edition 1st Edition**  
 Blass/Baker  
 © 2017  
 In Print / 2/9/2016  
 9781337275804

**Samples in the Last 18 Months**  
[Send Sample](#)

Created	Product	Qty	Status	Ship Via	Ship Date	Track
21/02/2019	Baker, Blass 21st Century Communication 1: Listening, Speaking and Critical Thinking 9781305945920	1	as400 In Process	EX-SGD1	n/a	n/a
21/02/2019	Stephenson/Dummett/Hughes Life Beginner Student's Book with App Code 9781337285285	1	as400 In Process	EX-SGD1	n/a	n/a
21/02/2019	Blass/Baker 21st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Workbook 9781337275804	1	as400 In Process	HS	n/a	n/a
21/02/2019	Longshaw/Blass/Vargo/Yeates 21st Century Reading 2: Creative Thinking and Reading with TED Talks 9781305265707	1	as400 In Process	HS	n/a	n/a

In the event that you need to edit the selected contact record, there is an Edit link to the right of the contact name. This link displays the same pop-up as the Contact ID link located in the contact list.

Contacts ACS Main Contacts Rinn Jamudin Dashboard

Dashboard

Rinn Jamudin **Edit** Add Note Priority:  
rinnarena.jamudin@cengage.com | 64101287 | Office: English | Office Hours: n/a  
SSO: Create SSO Account

The Contact Dashboard has 4 different tabs.

Contacts Overseas Family School... Suzanne Bentin Dashboard

Dashboard

Suzanne Bentin Edit Add Note Priority:  
suzanne\_bentin@ofs.edu.sg | +6567380211 | Office: n/a | Office Hours: n/a  
SSO: Create SSO Account

**Active Opportunities** Total Con  
Show All Opportunities | Create New Opty/Sample  
No active opportunities found for this contact

**Samples in the Last 18 Months**  
Send Sample  
No sample history found for this contact

**Tech Support**  
Magellan Asia Tech Support: Asia.techsupport@cengage.com  
Magellan Asia ELT Product Support: rinnarena.jamudin@cengage.com

- **SSO Account Request**
- **Active Opportunity** - Shows the Opportunities associated with the Contact.
- **Sample History in the last 8 months**- Shows
- **Tech Support**

## OPPORTUNITIES

### Create a New Opportunity



1. From Contact Dashboard, click the 'Create New Opty/Sample' link.

Contacts ACS Main Rinn Jamudin Dashboard

Dashboard

Rinn Jamudin Edit Add Note Priority:  
rinnarena.jamudin@cengage.com | 64101287 | Office: English | Office Hours: n/a  
SSO: Create SSO Account

Active Opportunities  
Show All Opportunities **Create New Opty/Sample**

Sample TESTING

Published: No  
Stage: Pending - Low  
Revenue: \$383.05  
Units: 26  
Sales Period: 2018 05 (May)  
Follow-up:  
26 item(s) in opty  
Edit/Sample  
Opty id: 3536359

21st Century Communication 1: Listening, Speaking and Critical Thinking 1st Edition 1st Edition  
Baker, Blass  
© 2017  
In Print / 2/9/2016  
9781305945920

Life Beginner Student's Book with App Code 2nd Edition 2nd Edition  
Stephenson/Dummett /Hughes  
© 2019  
In Print / 1/1/2018  
9781305945920

KEYWORDS FOR JAPAN TODAY Edition Edition  
STAPLETON  
© 2008  
In Print / 31/12/2007  
9784863120433

2. Complete any known opportunity data using the fields provided. Note that **Opty Name** and **Sales Period** are mandatory fields.

Create Opportunity: Open A Class English

Cengage Standard Subject Area:  Cancel Save & Clone Save & Create Another Opty Save & Close

Opty Detail Other Opty ID: NEW

Opty Name: \*  Expiration Date: 15/9/2018

Sales Stage: Pending - Low - 25% Units: 0 Revenue: £0.00 Weighted Revenue: £0.00

Sales Period: \*  Competitor Product: (View/Edit)

Type:

Follow up Date:  Decision Date: 1/5/2014 Comments: (View/Edit)

Follow up Action:

Class Start Date:

Act on Selected Format Layout Tax: £0.00 Tax %:  S&H: \$0 S&H%:  Add / Sample Products

X	Qty	Gratis	Product	S&H %	Price	Discnt Pct	Disc Price	Ext Price
No products found								

3. Click the **'Add Sample/Products'** link.

**Create Opportunity: Open A Class English**

Cengage Standard Subject Area:  Cancel Save & Clone Save & Create Another Opty Save & Clos

**Opity Detail** **Other** Opity ID: NE

Opity Name: \*  Expiration Date:

Sales Stage:  Units: 0 Revenue: £0.00 Weighted Revenue: £0.00

Sales Period: \*  Competitor Product: [\(View/Edit\)](#)

Type:

Follow up Date:  Decision Date:  Comments: [\(View/Edit\)](#)

Follow up Action:

Class Start Date:

Tax: £0.00 Tax %:  S&H: \$0 S&H%:

X	Qty	Gratis	Product	S&H %	Price	Discnt Pct	Disc Price	Ext Price
No products found								

4. Search for and drill into the product you want to add to the opportunity.
5. Click **'Select'** then click **'Now'** hyperlink to the immediate right of the Consider Product label.

**Catalog**

Browse  >

(Listening & Speaking - Key Titles): 23 product(s)

**2018**

Chase	Dellar/Walkley	Fettig/Najafi
 8/1/2018 2nd edition Avail: 13/12/2017 Pathways: Listening, Speaking, and Critical Thinking 1 <b>View   Select</b>	 21/2/2018 1st edition Perspectives 3: Student Book/Online Workbook Package, Printed Access Code <b>View   Deselect</b>	 12/1/2018 2nd edition Avail: 13/12/2017 Pathways: Listening, Speaking, and Critical Thinking Foundations <b>View   Select</b>

**2017 and Older**

Baker, Blass	Blass/Baker	Blass/Baker	Blass/Baker	Blass/Baker
 2/9/2016 1st edition Avail: 5/9/2016 21st Century Communication 1: Listening, Speaking and Critical Thinking <b>View   Select</b>	 8/11/2016 1st edition Avail: 18/11/2016 21st Century Communication 3: Listening, Speaking and Critical Thinking: Student Book with Online Wo <b>View   Select</b>	 16/11/2016 1st edition Avail: 18/11/2016 21st Century Communication 4: Listening, Speaking and Critical Thinking: Student Book with Online Wo <b>View   Select</b>	 2/9/2016 1st edition Avail: 9/9/2016 21st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Wo <b>View   Select</b>	 2/9/2016 1st edition Avail: 8/9/2016 21st Century Communication 2: Listening, Speaking and Critical Thinking: Student Book with Online Wo <b>View   Select</b>

6. Close this popup and repeat steps 4-5 to add additional products to the opportunity.
7. Close the pop-up catalog.
8. Click the **'Save'** command button to save your new opportunity.

## Split an Opportunity & Save & Clone an Opportunity

For those opportunities you are already tracking that may need to be split based on decision type, you can easily split the opportunity.



1. From the Opportunity detail pop-up, highlight the Products on the opportunity you want to split out.

Act on Selected		Format Layout	Add / Sample Products						
<input type="checkbox"/>	English Grammar for Beginners : English Grammar for Beginners Years 7-11 REYNOLDS 1st Edition Cengage Learning Australia ©2005 9781869467166	View Supplements	Comments	Subheading	\$17.00	\$12.50		\$12.50	\$12.50
<input type="checkbox"/>	Making a rabbit Giles/Randell/Smith 1st Edition Cengage Learning Australia ©2000 9780170095488	View Supplements	Comments	Subheading	\$8.30	\$6.10		\$6.10	\$6.10
<input type="checkbox"/>	The Bird That Could Think Smith 1st Edition Cengage Learning Australia ©2001 9780170097536	View Supplements	Comments	Subheading	\$10.27	\$7.55		\$7.55	\$7.55
<input checked="" type="checkbox"/>	Bersama-sama lagi Teacher Audio CDs Clarke/Day/Hardie 2nd Edition Cengage Learning Australia ©2005 9780170119207	View Supplements	Comments	Subheading	\$228.48	\$168.00		\$168.00	\$168.00
<input checked="" type="checkbox"/>	Nelson Essential Geography Skills Workbook Naumann/Davidson/Mathews 2nd Edition Cengage Learning Australia ©2016 9780170367073	View Supplements	Comments	Subheading	\$26.18	\$19.25		\$19.25	\$19.25

Choose the 'Act on Selected' option and select **Split Opportunity**.

Act on Selected		Format Layout	Add / Sample Products						
Bulk Field Update		16697	View Supplements	Comments	Subheading				
Split Opportunity									
Unforecast Selected									
Forecast Selected									
Remove Products									
Update Net Prices									
Sample									
<input type="checkbox"/>	Biology 12U : Student Best Value Bundle - CD-ROM DIGIuseppe/Fraser 1st Edition Nelson Education Ltd. ©2012 9780176520908	View Supplements	Comments	Subheading	\$0.00	\$0.00	0	\$0.00	\$0.00
<input type="checkbox"/>	FITNESS AND HEALTH -MINI ANTHOLOGY 24 MINI GUIDE 1st Edition Nelson Education Ltd. ©1994 9780176043964	Comments	Subheading						

Click **YES**

Act on Selected		Format Layout	Add / Sample Products						
<input type="checkbox"/>	English Grammar for Beginners : English Grammar for Beginners Years 7-11 REYNOLDS 1st Edition Cengage Learning Australia ©2005 9781869467166	View Supplements	Comments	Subheading	\$17.00	\$12.50		\$12.50	\$12.50
<input type="checkbox"/>	Making a rabbit Giles/Randell/Smith 1st Edition Cengage Learning Australia ©2000 9780170095488	View Supplements	Comments	Subheading	\$8.30	\$6.10		\$6.10	\$6.10
<input type="checkbox"/>	The Bird That Could Think Smith 1st Edition Cengage Learning Australia ©2001 9780170097536	View Supplements	Comments	Subheading	\$10.27	\$7.55		\$7.55	\$7.55
<input checked="" type="checkbox"/>	Bersama-sama lagi Teacher Audio CDs Clarke/Day/Hardie 2nd Edition Cengage Learning Australia ©2005 9780170119207	View Supplements	Comments	Subheading	\$228.48	\$168.00		\$168.00	\$168.00
<input checked="" type="checkbox"/>	Nelson Essential Geography Skills Workbook Naumann/Davidson/Mathews 2nd Edition Cengage Learning Australia ©2016 9780170367073	View Supplements	Comments	Subheading	\$26.18	\$19.25		\$19.25	\$19.25

**Confirm Split** ✕

Move the selected product(s) to a new opportunity?

No Yes

- When you return to the Contact Dashboard, the top opportunity will be the new opportunity created.

The screenshot shows the Rinn Jamudin Dashboard with a list of opportunities. The 'SPLIT OPPORTUNITY' is highlighted with a red box. The opportunities listed are:

- Sample TESTING**: Published: No, Stage: Pending - Low, Revenue: \$195.80, Units: 24, Sales Period: 2018 05 (May), Follow-up: 24 item(s) in opty, Opty Id: 3536359
- 21st Century Communication 1: Listening, Speaking and Critical Thinking 1st Edition 1st Edition**: Baker, Blass, © 2017, In Print / 2/9/2016, 9781305945920
- Life Beginner Student's Book with App Code 2nd Edition 2nd Edition**: Stephenson/Dummett /Hughes, © 2019, In Print / 1/1/2018, 9781337285285
- KEYWORDS FOR JAPAN TODAY Edition Edition**: STAPLETON, © 2008, In Print / 31/12/2007, 9784863120433
- SPLIT OPPORTUNITY**: Published: No, Stage: Pending - Low, Revenue: \$187.25, Units: 2, Sales Period: 2018 05 (May), Follow-up: 2 item(s) in opty, Opty Id: 3561808
- Bersama-sama lagi Teacher Audio CDs 2nd Edition 2nd Edition**: Clarke/Day/Hardie, © 2005, In Print / 18/10/2004, 9780170119207
- Nelson Essential Geography Skills Workbook 2nd Edition 2nd Edition**: Naumann/Davidson /Matthews, © 2016, In Print / 11/12/2015

The original opportunity you selected should now have an adjusted (decreased) forecasted unit value.

### Edit an Opportunity

Anytime you see an opportunity ID (a unique identifier) you can click the hyperlink to display all opportunity information. This is where you can best manage the opportunity and related details.

The screenshot shows the Contacts dashboard with a table of contact records. The 'Last Name' column is highlighted with a red box. The table shows 2 records out of 141 after filtering.

Contact ID	Last Name	First Nam...	Account	Department	Mr/Ms	Email	Phone	Office Hours	Contact Ty...	SSO St
1708625C	Jamudin	Rinn	ACS Main	English	Miss	rinnarena.jamu...	64101287	Add	Administrator	
1708621C	Jamudin	Rinn	Harry Technology MIS Campus	MIS	Miss	rinnarena.jamu...	64101287	Add	ELT Teacher	

Or from the Contact Dashboard, Pipeline Tab, by clicking 'Edit/Sample'.

Contacts

ACS Main  
Contacts

Rinn Jamudin  
Dashboard

**Dashboard**

Rinn Jamudin [Edit](#) [Add Note](#) Priority:  
 rinnarena.jamudin@cengage.com | 64101287 | Office: English | Office Hours: n/a  
[SSO: Create SSO Account](#)

**Active Opportunities**

[Show All Opportunities](#) | [Create New Opty/Sample](#)

Sample TESTING			
<p><b>Published:</b> No  <b>Stage:</b> Pending - Low  <b>Revenue:</b> \$195.80  <b>Units:</b> 24  <b>Sales Period:</b> 2018 05 (May)  <b>Follow-up:</b>            24 item(s) in opty  <a href="#">Edit/Sample</a>  <b>Opty Id:</b> 3336359</p>	<p><b>21st Century Communication 1: Listening, Speaking and Critical Thinking</b>  <b>1st Edition 1st Edition</b>            Baker, Blass            © 2017            In Print / 2/9/2016            9781305945920</p>	<p><b>Life Beginner Student's Book with App Code</b>  <b>2nd Edition 2nd Edition</b>            Stephenson/Dummett /Hughes            © 2019            In Print / 1/1/2018            9781337285285</p>	<p><b>KEYWORDS FOR JAPAN TODAY</b>  <b>Blue Edition</b>            STAPLETON            © 2008            In Print / 31/12/2007            9784863120433</p>
<p><b>SPLIT OPPORTUNITY</b></p> <p><b>Published:</b> No  <b>Stage:</b> Pending - Low  <b>Revenue:</b> \$187.25  <b>Units:</b> 2  <b>Sales Period:</b> 2018 05 (May)  <b>Follow-up:</b>            2 item(s) in opty  <a href="#">Edit/Sample</a>  <b>Opty Id:</b> 3331808</p>	<p><b>Bersama-sama lagi Teacher Audio CDs</b>  <b>2nd Edition 2nd Edition</b>            Clarke/Day/Hardie            © 2005            In Print / 18/10/2004            9780170119207</p>	<p><b>Nelson Essential Geography Skills Workbook</b>  <b>2nd Edition 2nd Edition</b>            Naumann/Davidson /Matthews            © 2016            In Print / 11/12/2015            9780170367073</p>	
<p><b>July Semester</b></p> <p><b>Published:</b> No  <b>Stage:</b> Pending - Medium  <b>Revenue:</b> \$383.35  <b>Units:</b> 18  <b>Sales Period:</b> 2019 03 (Mar)  <b>Follow-up:</b> 23/2/2019            18 item(s) in opty  <a href="#">Edit/Sample</a>  <b>Opty Id:</b> 3332637</p>	<p><b>21st Century Reading 2: Creative Thinking and Reading with TED Talks</b>  <b>1st Edition 1st Edition</b>            Longshaw/Blass /Vargo/Yeates            © 2015            In Print / 19/2/2015            9781305265707</p>	<p><b>Life 1 with Web App</b>  <b>2nd Edition 2nd Edition</b>            Hughes/Dummett /Stephenson            © 2019            In Print / 12/6/2018            9781337905626</p>	<p><b>21st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Workbook</b>  <b>1st Edition 1st Edition</b>            Blass/Baker            © 2017            In Print / 2/9/2016            9781337275804</p>

## Add Opportunity Contacts

1. From the Opportunity detail pop-up, click the **'Add Contacts'** link.

The screenshot shows the 'View/Edit Opportunity: Open ACS Main' window. The 'Cengage Standard Subject Area' is set to 'Baker, Blask'. The 'Opty Name' is 'Sample TESTING' and the 'Expiration Date' is '16/9/2019'. The 'Sales Stage' is 'Pending - Low - 25%'. The 'Units' are 24, 'Revenue' is \$195.80, and 'Weighted Revenue' is \$48.95. The 'Sales Period' is '2018 05 (May)'. The 'Competitor Product' is '(View/Edit)'. The 'Type (Important!)' is a dropdown menu. The 'Follow up Date' and 'Decision Date' are input fields. The 'Comments' are '(View/Edit)'. The 'Follow up Action' is a dropdown menu. The 'Class Start Date' is an input field. The 'Contact(s):' link is highlighted with a red box. The 'Add Contacts' link is also highlighted with a red box. The 'Opty ID' is 3536359.

X	Qty	Product	Local Price	Price	Discnt Pct	Disc Price	Ext Price
<input type="checkbox"/>		21st Century Communication 1: Listening, Speaking and Critical Thinking Baker, Blask 1st Edition CENGAGE ELT ©2017 9781305945920 Primary View Supplements Comments Subheading	\$76.09	\$55.95		\$55.95	\$55.95
<input type="checkbox"/>		Life Beginner Student's Book with App Code Stephenson/Dummett/Hughes 2nd Edition CENGAGE ELT ©2019 9781337285285 View Supplements Comments Subheading	\$52.97	\$38.95		\$38.95	\$38.95

2. Use the filter and option buttons to locate the contact(s) you wish to add to the selected opportunity.

The screenshot shows the 'Select Contacts' window. The 'Filter Contacts' field is empty. The 'Create Contact' button is highlighted with a red box. The list of contacts includes:   
 Burrough, Rob: English +6564721477   
 Jamudin, Rinn: English Administrator 64101287 Office: English   
 Rinn, Test: (No Department Found) Administrator   
The 'Contacts to Add:' field shows '1'.

Contacts already on an opportunity will appear to be selected with a gray, completed check box.

3. To create/add a new contact, select **"Create Contact"** and fill in the details.

The screenshot shows the 'Edit Contact - ACS Main' window. The 'Salutation' is a dropdown menu. The 'Name' is an input field. The 'Email' is an input field. The 'Cell Phone' is an input field. The 'Work Phone' is an input field. The 'Room Location' is an input field. The 'Comments' is a text area. The 'Last Contacted Date' is a dropdown menu. The 'Contact Type' is a dropdown menu. The 'Job Title' is an input field. The 'Roles' are:   
 Author   
 Reviewer   
 Competitive Author   
 Faculty Partner   
 Executive Contact   
 Pilot User   
The 'Office Hours' and 'Class Schedule' are 'n/a'. The 'Add to Daily Plan' button is highlighted with a red box. The 'Primary Department' is 'English'. The 'Account Depts' and 'Contact Depts' are input fields.

4. Click the **'Select'** command button. Then click **Save and Close**.

## Manage Existing Contacts

**View/Edit Opportunity: Open ACS Main**

Cengage Standard Subject Area: Baker, Blass

Buttons: Cancel, Save & Create Another Opty, Save & Close

Opty ID: 3536359

Opty Name: \* Sample TESTING Expiration Date: 16/9/2019

Sales Stage: Pending - Low - 25% Units: 24 Revenue: \$195.80 Weighted Revenue: \$48.95

Sales Period: \* 2018 05 (May) Competitor Product: (View/Edit)

Type (Important!):

Follow up Date: Decision Date: Comments: (View/Edit)

Follow up Action:

Class Start Date:

**Contact(s): - Add Contacts**

**Rinn Jamudin**

Buttons: Cancel, Save & Clone, Save & Create Another Opty, Save & Close

Opty ID: 2893909

15/9/2018

7.00 Weighted Revenue: £11.75

**Contact(s): - Add Contacts**

- Navigate to Contact
- Remove Contact from Opty
- Make Primary

6: Add / Sample Products

If you click a contact hyperlink on an opportunity you are not navigated to a new screen, rather are presented with a list of actions you can take with that contact. Contacts already in a bold, yellow font are designated as the primary contact on an opportunity.

## Add Sample/Products

The 'Add Sample/Products' hyperlink will bring up the catalog, showing course products by default.

The screenshot shows a 'Create Opportunity' form for 'Open Overseas Family School Main'. The form includes fields for 'Cengage Standard Subject Area', 'Opty Name', 'Expiration Date' (15/9/2019), 'Sales Stage' (Pending - Low - 25%), 'Units', 'Revenue', 'Weighted Revenue', 'Sales Period', 'Competitor Product', 'Type (Important!)', 'Follow up Date', 'Decision Date', 'Comments', 'Follow up Action', and 'Class Start Date'. At the bottom, there is a table with columns: X, Qty, Product, Local Price, Price, Discnt Pct, Disc Price, Ext Price. The 'Add / Sample Products' button is highlighted with a red box.

1. From the Opportunity detail pop-up, click the 'Add Sample/Products' link.
2. Locate the product you want to add to the opportunity.
3. Drill into the product to view product details.
4. Click the 'Now' link to the immediate right of the 'Consider Product' label.

The screenshot shows a 'Catalog' window with a search bar and a list of products. The 'Consider Product' and 'Send Sample' buttons are highlighted with a red box. The products are categorized by year: 2018 and 2017 and Older. The 2018 products include 'Chase', 'Dellar/Walkley', and 'Fettig/Najafi'. The 2017 and Older products include 'Baker, Blass', 'Blass/Baker', and 'Blass/Baker'.

5. Close the product pop-up
6. Repeat steps 2-5 to add more products.
7. Close the pop-up to return to the opportunity details pop-up.

## Remove Products

From the Opportunity detail pop-up, highlight the Products on the opportunity you want to delete.

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area: Longshaw/Blass/Vargo/Yeates

Opty Detail Other Opty ID: 3532637

Opty Name: July Semester Expiration Date: 1/12/2019

Sales Stage: Pending - Medium - 50% Units: 18 Revenue: \$383.35 Weighted Revenue: \$191.68

Sales Period: 2019 03 (Mar) Competitor Product: (View/Edit)

Type (Important!): Supplement

Follow up Date: 23/2/2019 Decision Date: 13/4/2019 Comments: (View/Edit)

Follow up Action: Appointment

Class Start Date: 2/7/2019

Act on Selected Format Layout Add / Sample Products

X	Qty	Product	Local Price	Price	Discnt Pct	Disc Price	Ext Price
<input checked="" type="checkbox"/>		1st Century Reading 2: Creative Thinking and Reading with TED Talks Longshaw/Blass/Vargo/Yeates 1st Edition CENGAGE ELT ©2015 9781305265707 Primary View Supplements Comments Subheading	\$52.31	\$54.95	30	\$38.46	\$38.46
<input checked="" type="checkbox"/>		Life 1 with Web App Hughes/Dummett/Stephenson 2nd Edition CENGAGE ELT ©2019 9781337905626 View Supplements Comments Subheading	\$40.88	\$42.95	30	\$30.06	\$30.06
<input checked="" type="checkbox"/>		1st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Wo Blass/Baker 1st Edition CENGAGE ELT ©2017 9781337275804 View Supplements Comments Subheading	\$65.63	\$68.95	30	\$48.26	\$48.26
<input type="checkbox"/>		Life Upper-Intermediate Student's Book with App Code Dummett/Hughes/Stephenson 2nd Edition CENGAGE ELT ©2019 9781337286121 View Supplements Comments Subheading	\$52.97	\$38.95		\$38.95	\$38.95
<input type="checkbox"/>		The Flying Tree Ellis 1st Edition Cengage Learning Australia ©2008 9780170136150 View Supplements Comments Subheading	\$10.27	\$7.55		\$7.55	\$7.55

Choose the 'Act on Selected' option and select **Remove Products**.

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area: Longshaw/Blass/Vargo/Yeates

Opty Detail Other Opty ID: 3532637

Opty Name: July Semester Expiration Date: 1/12/2019

Sales Stage: Pending - Medium - 50% Units: 18 Revenue: \$383.35 Weighted Revenue: \$191.68

Sales Period: 2019 03 (Mar) Competitor Product: (View/Edit)

Type (Important!): Supplement

Follow up Date: 23/2/2019 Decision Date: 13/4/2019 Comments: (View/Edit)

Follow up Action: Appointment

Class Start Date: 2/7/2019

Act on Selected Format Layout Add / Sample Products

- Bulk Field Update
- Split Opportunity
- Unforecast Selected
- Forecast Selected
- Remove Products**
- Update Net Prices
- Sample

		Local Price	Price	Discnt Pct	Disc Price	Ext Price
<input type="checkbox"/>		\$52.31	\$54.95	30	\$38.46	\$38.46
<input type="checkbox"/>		\$40.88	\$42.95	30	\$30.06	\$30.06
<input type="checkbox"/>		\$65.63	\$68.95	30	\$48.26	\$48.26
<input type="checkbox"/>		\$52.97	\$38.95		\$38.95	\$38.95
<input type="checkbox"/>		\$10.27	\$7.55		\$7.55	\$7.55

## Unforecast Products

To remove a Product from the forecasted revenue, from the Opportunity detail pop-up, highlight the Products on the opportunity you want to delete. And select **Unforecast Selected**.

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area: Longshaw/Blass/Vargo/Yeates

Cancel Save & Create Another Opty Save & Close

Opty Detail Other Opty ID: 3532637

Opty Name: \* July Semester Expiration Date: 1/12/2019

Contact(s): - Add Contacts  
Rinn Jamudin

Sales Stage: Pending - Medium - 50% Units: 18 Revenue: \$383.35 Weighted Revenue: \$191.68

Sales Period: \* 2019 03 (Mar) Competitor Product: (View/Edit)

Type (Important!): Supplement

Follow up Date: 23/2/2019 Decision Date: 13/4/2019 Comments: (View/Edit)

Follow up Action: Appointment

Class Start Date: 2/7/2019

Act on Selected Format Layout Add / Sample Products

	Local Price	Price	Discnt Pct	Disc Price	Ext Price
Product 2: Creative Thinking and Reading with TED Talks Longshaw/Blass/Vargo/Yeates 1st Edition 2015 9781305265707 Primary View Supplements Comments Subheading	\$52.31	\$54.95	30	\$38.46	\$38.46
Product 3: Hughes/Dummett/Stephenson 2nd Edition CENGAGE ELT ©2019 9781337905626 View Supplements Comments Subheading	\$40.88	\$42.95	30	\$30.06	\$30.06
Product 1: Listening, Speaking and Critical Thinking: Student Book with Online Workbook Edition CENGAGE ELT ©2017 9781337275804 View Supplements Comments Subheading	\$65.63	\$68.95	30	\$48.26	\$48.26
Product 4: Mediate Student's Book with App Code Dummett/Hughes/Stephenson 2nd Edition CENGAGE ELT 986121 View Supplements Comments Subheading	\$52.97	\$38.95		\$38.95	\$38.95
Product 5: The Flying Tree Ellis 1st Edition Cengage Learning Australia ©2008 9780170136150 View Supplements Comments Subheading	\$10.27	\$7.55		\$7.55	\$7.55

By default the first product added to an opportunity is the primary product.

## Close an Opportunity



1. From the Opportunity detail pop-up, choose the **'Stage'** drop-down list box.

Cengage Standard Subject Area: [Dropdown]

Cancel Save & Clone Save & Create Another Opty Save & Close

Opty Detail Other Opty ID: 2893909

Opty Name: \* a Expiration Date: 15/9/2018

Contact(s): - Add Contacts  
Elizabeth Camilleri  
Richard Clarke

Sales Stage: Pending - Low - 25% Units: 2 Revenue: £47.00 Weighted Revenue: £11.75

Sales Period: \* Closed - Won - 100% Competitor Product: (View/Edit)

Type: Closed - Won - Spain - 70%

Follow up Date: Pending - High - 75% 2014 Comments: (View/Edit)

Follow up Action: Pending - Medium - 50%

Class Start Date: Pending - Low - 25%

Duplicate/Error - 0%

Pilot - 75%

2. Select relevant **'Closed'** option.
3. Click the **'Save'** command button.

Sample an Existing Opportunity



- From the Opportunity detail pop-up, highlight the Products on the opportunity you want to Sample.

X	Qty	Gratis	Product	S&H %	Price	Discnt Pct	Disc Price	Ext Price
<input checked="" type="checkbox"/>	1		Holiday Explorer 1 with Audio CD : English for Short Courses Hill 1st Edition ©2011 9781111400590 Primary View Supplements Comments Subheading		£16.50		£16.50	£16.50
<input type="checkbox"/>	1		Life Upper-Intermediate Workbook Without Key and Audio CD Dummett 2nd Edition ©2019 9781337286299 Comments Subheading		£17.00		£17.00	£17.00
<input checked="" type="checkbox"/>	1		Life Upper-Intermediate Combo Split B with App Code and Workbook Audio CD Dummett/Hughes/Stephenson 2nd Edition ©2019 9781337286251 View Supplements Comments Subheading		£25.00		£25.00	£25.00
<input type="checkbox"/>	1		Life Pre-Intermediate Student's Book with App Code Hughes/Stephenson/Dummett 2nd Edition ©2019 9781337285704 View Supplements Comments Subheading		£30.00		£30.00	£30.00

- Choose the 'Act on Selected' option and select **Sample**.

Act on Selected	Format Layout	Tax: £0.00 Tax %:	S&H: \$0.00	S&H%:	Add / Sample Products
<input checked="" type="checkbox"/>					
Bulk Field Update					
Split Opportunity					
Unforecast Selected					
Forecast Selected					
Remove Products					
Update Net Prices					
<input checked="" type="checkbox"/>					

- Using the check boxes provided, select the contact(s) you want to sample.
- Click the 'Create Sample' box to the immediate left of the version of the product(s) you wish to sample.

**1: Sample Options**

1 Sample Options    2 Confirm/Edit Addresses

**Review Copy**

**Contacts**

Elizabeth Camilleri  
 Richard Clarke

**Create Sample** Student Edition  
Dummett Life Upper-Intermediate Workbook Without Key and Audio CD  
9781337286299 1/1/2018

Supplements

**Create Sample** Student Edition  
Hughes/Stephenson/Dummett Life Pre-Intermediate Student's Book with App  
Code 9781337285704 1/1/2018

Supplements

- Adjust the quantity (if necessary).
- Click the 'Next' command button.
- Confirm/edit the address used for the sample(s).
- Click 'Save and Close' and close the catalog pop-up.

## Sample a New Opportunity



1. From the Institution Course detail pop-up, create a new opportunity. Be sure to fill in all the mandatory fields, or you won't be able to sample.
2. Click **'Add Sample/Product'**.

The screenshot shows a 'Catalog' window with a search bar containing 'ESL General Engl' and '> Adult - Key Titles'. Below the search bar, there are buttons for 'Consider Product' and 'Send Sample', both with 'Now' and 'Later' options. The main area displays a list of products under the heading '(Adult - Key Titles): 53 product(s)'. The products are 'Life' textbooks by Hughes/Dummett/Stephenson, with various editions and availability dates. Each product card includes a 'View' and 'Deselect' button.

3. After you have added a product to the opportunity click the **'Save'**.
4. Select the product and **Act on Selected** then click **Sample**.

The screenshot shows the 'View/Edit Opportunity: Open ACS Main' window. The 'Cengage Standard Subject Area' is set to 'Hughes/Dummett/Stephenson'. The 'Opty Name' field is empty, and the 'Expiration Date' is set to '15/9/2019'. The 'Sales Stage' is 'Pending - Low - 25%'. The 'Units' are 6, 'Revenue' is \$257.70, and 'Weighted Revenue' is \$64.42. The 'Class Start Date' field is highlighted with a red box. Below the form, the 'Act on Selected' menu is open, showing options like 'Bulk Field Update', 'Split Opportunity', 'Unforecast Selected', 'Forecast Selected', 'Remove Products', 'Update Net Prices', and 'Sample'. The 'Sample' option is highlighted with a red box.

	Local Price	Price	Disct Pct	Disc Price	Ext Price
op Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905626 Primary View Supplements	\$58.41	\$42.95		\$42.95	\$42.95
op Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905633 View Supplements	\$58.41	\$42.95		\$42.95	\$42.95
op Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905640 View Supplements	\$58.41	\$42.95		\$42.95	\$42.95
op Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905657 View Supplements	\$58.41	\$42.95		\$42.95	\$42.95
Life 5 with Web App Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905664 View Supplements	\$58.41	\$42.95		\$42.95	\$42.95
Life 6 with Web App Hughes/Dummett/Stephenson 2nd Edition ©2019 9781337905671 View Supplements	\$58.41	\$42.95		\$42.95	\$42.95

- 5.

- Click the Sample Type option and select either for **Review Copy** or for **Desk Copy**.

The screenshot shows a software window titled "1: Sample Options" with two tabs: "1 Sample Options" (active) and "2 Confirm/Edit Addresses". On the left, a dropdown menu for "Sample Type" is open, with "Review Copy" selected. The main area contains two product listings. The first listing is for "Student Edition" by "Blass/Baker" with a "Create Sample" button, a quantity of "1", and a "Supplements" section. The second listing is for "Student Edition" by "Hughes/Dummett/Stephenson" with a "Create Sample" button and a "Supplements" section.

- Adjust the quantity (if necessary).
- Click the **'Next'** command button
- Confirm/edit the address used for the sample(s).
- Click **'Save and Close'** and close the catalog pop-up.

## Sample Supplements



- Follow the steps for Sampling a Product.
- On the Sample Options screen, click the drop down for the Supplements.

The screenshot shows the "1: Sample Options" window with the "Review Copy" section selected. Under "Contacts", there are two entries: "Elizabeth Camilleri" and "Richard Clarke", each with a checkbox. The main area displays two product listings, each with a "Create Sample" button and a "Supplements" section.

- Use the check boxes provided to select the supplement(s) you wish to sample.
- Adjust the quantity (if necessary).
- Click the **'Next'** command button
- Confirm/edit the address used for the sample(s).
- Click **'Save and Close'** and close the product details pop-up.

## Sampling Shipment Options

2: Confirm/Edit Addresses

1 Sample Options
 2 Confirm/Edit Addresses

Magellan Ship Via	Description	Magellan Ship Via	Description	Magellan Ship Via	Description
DSU	Air Freight - Australia	DSU3	Air Freight - Canada	DSWM	Air Freight - UK
DSAI	Air Freight - US	DSFX	Air Freight - FedEx	EX-SGD1	Delco
EX-SGF1	TNT	EX-SGIF	FedEx	EX-SGYF	YFE-Clark Express
EX-SGFH	FedEx HK	EX-SGML	Master Logistic	EX-SGK3	K-LINE Air

**Miss Rinn Jamudin**  
 rinnarena.jamudin@cengage.com [Edit Email Address](#)  
[Change Address](#)

English  
 151 Lorong Chuan, #02-08 New Tech Park

Singapore, null 556741  
 Singapore

Ship Via: DSU Req Ship Dt:

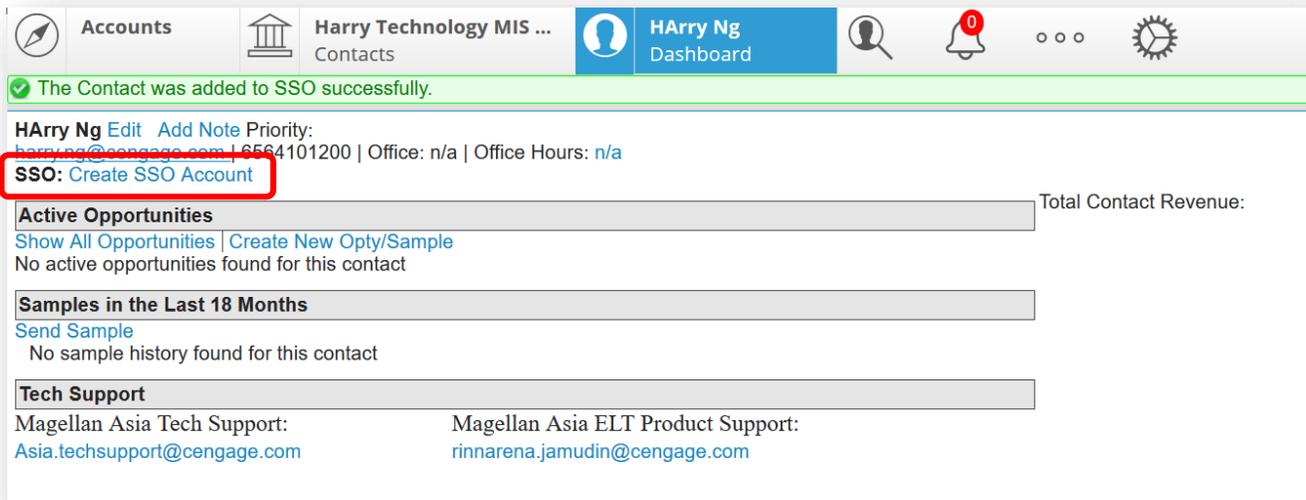
4 Sample DSU  
 DSU3  
 DSWM  
 DSAI  
 DSFX  
 EX-SGD1  
 EX-SGF1  
 EX-SGIF  
 EX-SGYF  
 EX-SGFH  
 EX-SGML  
 EX-SGK3  
 HS  
 DSAH

Back
Save & Submit Samples

Shipping Point	ship via code	Warehouse	Specific Territory	Description
Dropship	DSAH	Air Freight - US	Hong Kong	For HK dropship via airfreight only
Dropship	DSAI	Air Freight - US	SG/MY/TH/ID/PH/VN	AF Dropship via SG
Dropship	DSFX	Air Freight - FedEx	All	all to use - shipping direct to destination
Dropship	DSU	Air Freight - Australia	All	all to use
Dropship	DSU-	Air Freight - Australia	All	all to use
Dropship	DSU3	Air Freight - Canada	All	all to use
Dropship	DSWM	Air Freight - UK	All	all to use
Ex-Sing	EX-SGD1	Delco	Singapore	For Singapore used only
Ex-Sing	EX-SGFH	FedEx HK	Hong Kong	For Hong Kong used only
Ex-Sing	EX-SGF1	TNT	Malaysia	For Malaysia used only
Ex-Sing	EX-SGIF	FedEx	All	For All used only
Ex-Sing	EX-SGK3	K-LINE Air	Japan	For Japan used only
Ex-Sing	EX-SGML	Master Logistic	Indonesia	For Indonesia used only
Ex-Sing	EX-SGYF	YFE-Clark Express	Philippines	For Philippines used only
Office	HS	Hand Sampling	ALL	For ALL used

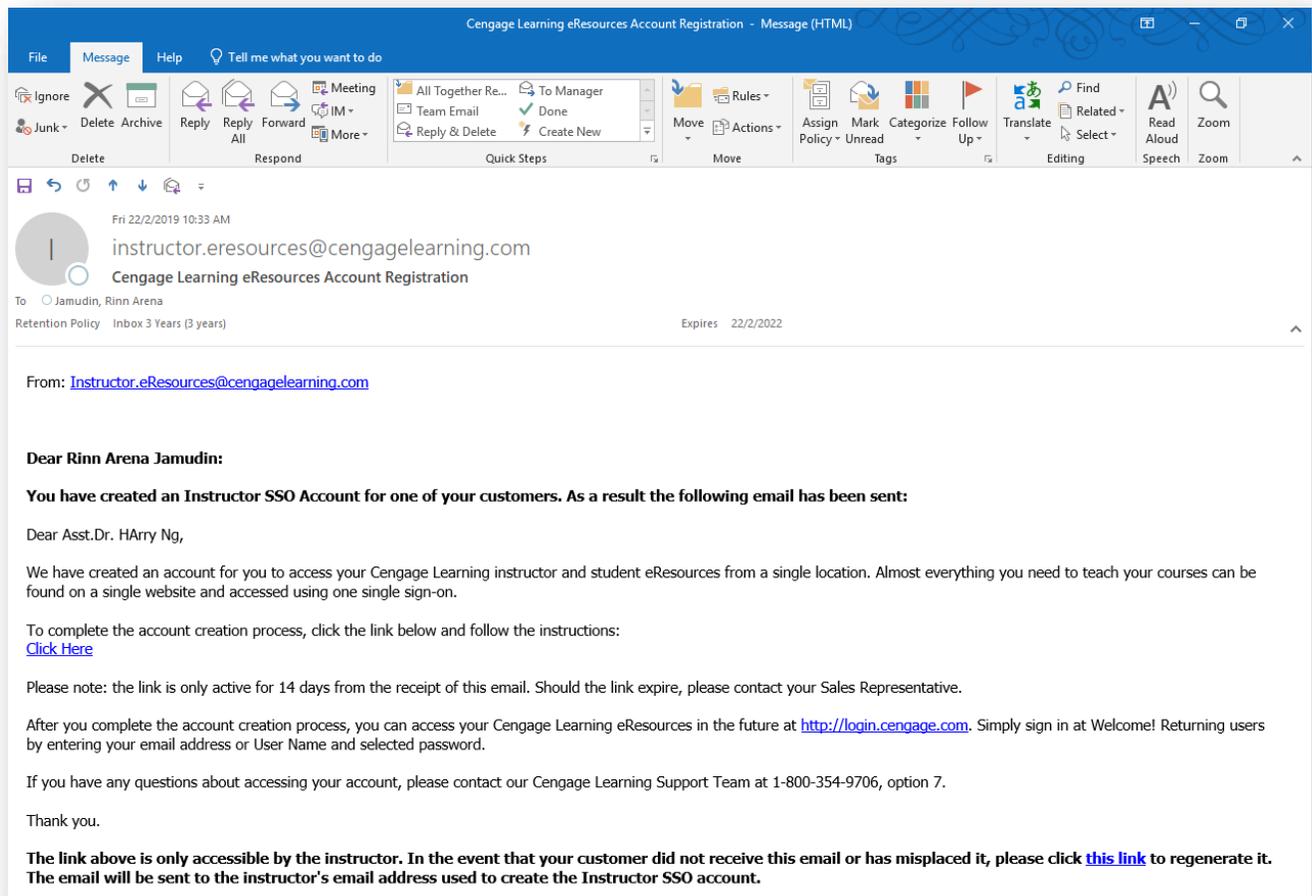
## Create/Request SSO Account

1. Click the **Create SSO Account** on the Account dashboard.



The screenshot shows a CRM interface for a contact named Harry Ng. At the top, there's a navigation bar with 'Accounts', 'Harry Technology MIS ...', and 'Harry Ng Dashboard'. Below the navigation bar, a green notification bar states 'The Contact was added to SSO successfully.' The contact details include 'Harry Ng Edit Add Note Priority: harry.ng@cengage.com | 6564101200 | Office: n/a | Office Hours: n/a'. A red box highlights the link 'SSO: Create SSO Account'. Below this, there are sections for 'Active Opportunities', 'Samples in the Last 18 Months', and 'Tech Support'.

2. Within minutes, you will receive a confirmation email from [instructor.eresources@cengagelearning.com](mailto:instructor.eresources@cengagelearning.com) to inform the account has been successfully created.



The screenshot shows an email from 'instructor.eresources@cengagelearning.com' with the subject 'Cengage Learning eResources Account Registration'. The email is dated 'Fri 22/2/2019 10:33 AM' and is addressed to 'Jamudin, Rinn Arena'. The body of the email contains the following text:

From: [instructor.eresources@cengagelearning.com](mailto:instructor.eresources@cengagelearning.com)

**Dear Rinn Arena Jamudin:**

**You have created an Instructor SSO Account for one of your customers. As a result the following email has been sent:**

Dear Asst.Dr. HARRY Ng,

We have created an account for you to access your Cengage Learning instructor and student eResources from a single location. Almost everything you need to teach your courses can be found on a single website and accessed using one single sign-on.

To complete the account creation process, click the link below and follow the instructions:  
[Click Here](#)

Please note: the link is only active for 14 days from the receipt of this email. Should the link expire, please contact your Sales Representative.

After you complete the account creation process, you can access your Cengage Learning eResources in the future at <http://login.cengage.com>. Simply sign in at Welcome! Returning users by entering your email address or User Name and selected password.

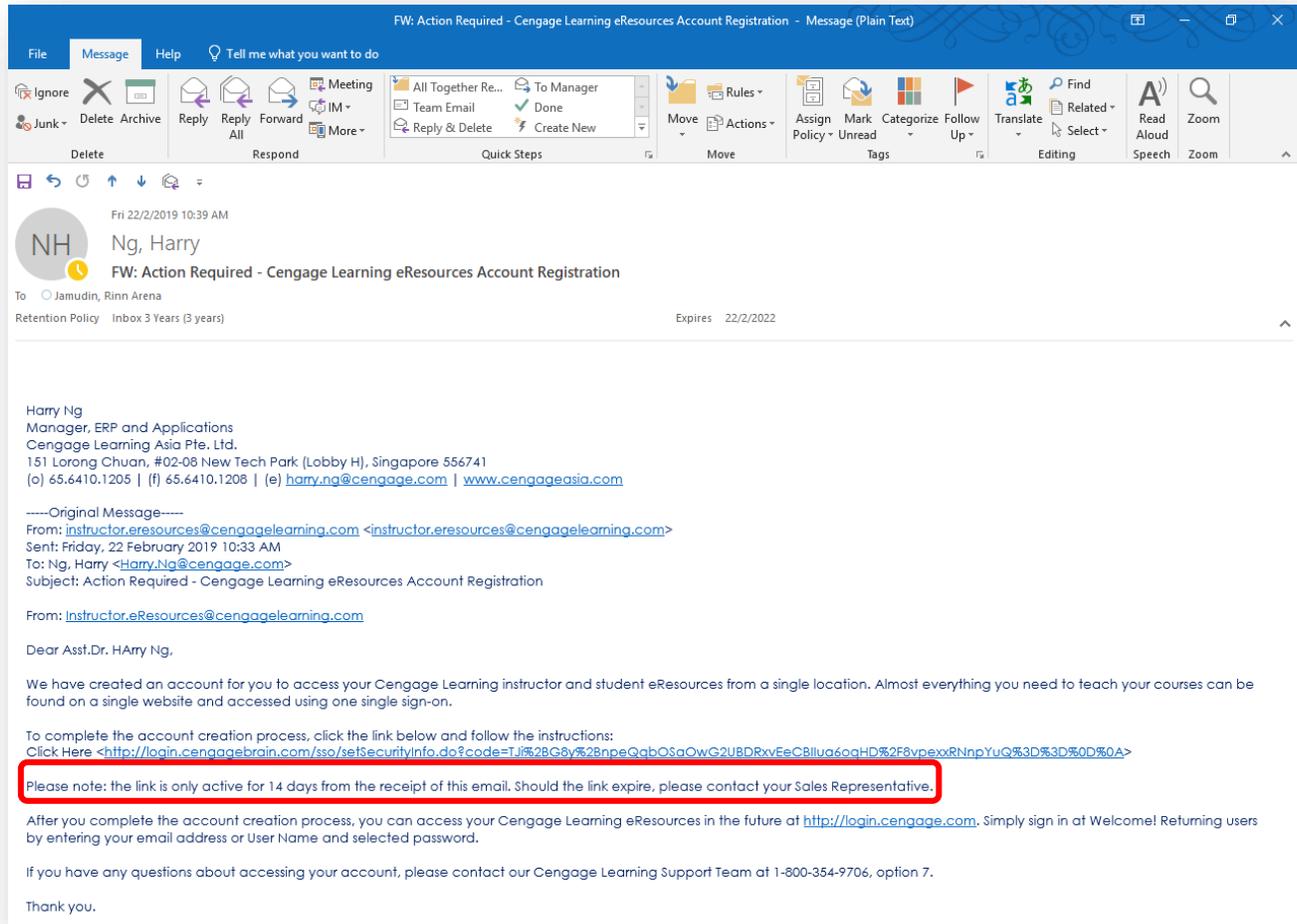
If you have any questions about accessing your account, please contact our Cengage Learning Support Team at 1-800-354-9706, option 7.

Thank you.

**The link above is only accessible by the instructor. In the event that your customer did not receive this email or has misplaced it, please click [this link](#) to regenerate it. The email will be sent to the instructor's email address used to create the Instructor SSO account.**

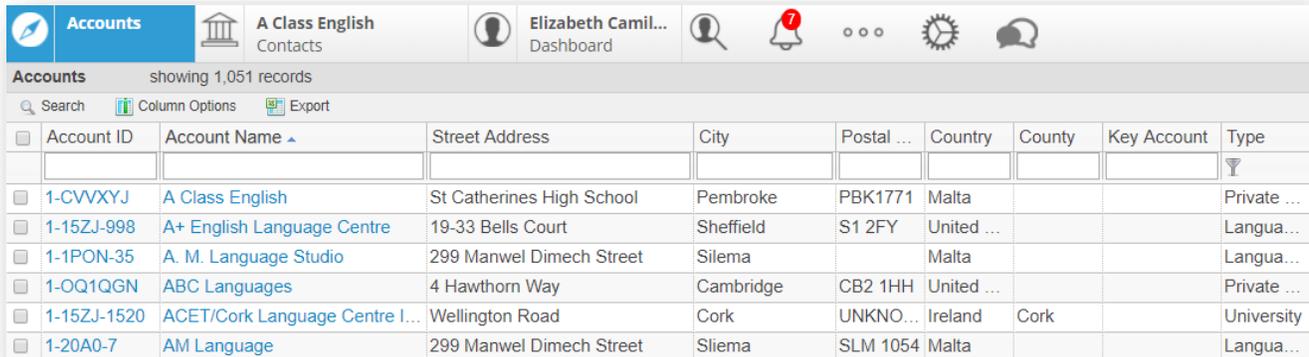
3. At the same time, the teacher/instructor will receive an email from [instructor.eresources@cengagelearning.com](mailto:instructor.eresources@cengagelearning.com) to inform that we have created an instructor's account for him and provided a simple instruction on how to complete the process.

PLEASE NOTE THE COMPLETION PROCESS LINK IS **ONLY VALID FOR 14 DAYS**. SO please help to remind the teacher/instructor to submit immediately upon receiving the email.



## Exporting

The export command button is located on the Action Bar. When you click the export button you are starting the process of exporting all of the records currently displayed in the view. If you executed a filter before clicking the button, then only those records displayed in the filtered list will be exported.



The screenshot shows the 'Accounts' application interface. At the top, there is a navigation bar with 'Accounts' selected, a user profile for 'Elizabeth Camil...', and various system icons. Below the navigation bar, the main area displays 'Accounts showing 1,051 records'. There is a search bar and an 'Export' button. A table of accounts is shown with columns: Account ID, Account Name, Street Address, City, Postal Code, Country, County, Key Account, and Type. The table contains several rows of account data.

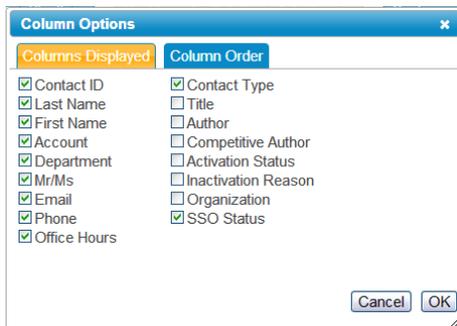
Account ID	Account Name	Street Address	City	Postal ...	Country	County	Key Account	Type
1-CVVXYJ	A Class English	St Catherines High School	Pembroke	PBK1771	Malta			Private ...
1-15ZJ-998	A+ English Language Centre	19-33 Bells Court	Sheffield	S1 2FY	United ...			Langua...
1-1PON-35	A. M. Language Studio	299 Manwel Dimech Street	Silema		Malta			Langua...
1-OQ1QGN	ABC Languages	4 Hawthorn Way	Cambridge	CB2 1HH	United ...			Private ...
1-15ZJ-1520	ACET/Cork Language Centre I...	Wellington Road	Cork	UNKNO...	Ireland	Cork		University
1-20A0-7	AM Language	299 Manwel Dimech Street	Sliema	SLM 1054	Malta			Langua...



1. Select the view you want to export.

**Optional:** apply a filter to the view.

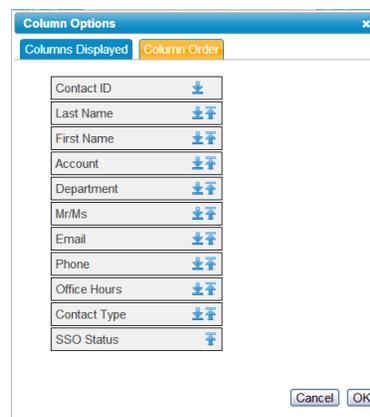
2. Click the **'Export'** command button. A pop-up dialog box will appear allowing you to not only select the columns/fields you want to export, but also pre-set the order in which the columns/fields are presented in the output document. You can click the tabs at the top of the pop-up to adjust your selection(s).



The 'Column Options' dialog box is shown with the 'Columns Displayed' tab selected. It contains two columns of checkboxes for selecting fields to export. The 'Contact ID' checkbox is checked, while others are unchecked.

Columns Displayed	Column Order
<input checked="" type="checkbox"/> Contact ID	<input checked="" type="checkbox"/> Contact Type
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Title
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Author
<input checked="" type="checkbox"/> Account	<input type="checkbox"/> Competitive Author
<input checked="" type="checkbox"/> Department	<input type="checkbox"/> Activation Status
<input checked="" type="checkbox"/> Mr/Ms	<input type="checkbox"/> Inactivation Reason
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Organization
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> SSO Status
<input checked="" type="checkbox"/> Office Hours	

Buttons: Cancel, OK



The 'Column Options' dialog box is shown with the 'Column Order' tab selected. It displays a list of the selected columns with up and down arrows to reorder them. The order from top to bottom is: Contact ID, Last Name, First Name, Account, Department, Mr/Ms, Email, Phone, Office Hours, Contact Type, and SSO Status.

Column Order
Contact ID
Last Name
First Name
Account
Department
Mr/Ms
Email
Phone
Office Hours
Contact Type
SSO Status

Buttons: Cancel, OK

3. Click the **'OK'** command button.
4. The exported data is in a file displayed in the lower left-hand corner of your screen.
5. Click the file name to launch the export results in Microsoft Excel.