

MAGELLAN 2

ASIA ELT USER GUIDE

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TABLE OF CONTENTS

VIEWS, BARS & HEADERS	2
Core Views	2
Account Views	3
Contact Views	3
BARS	4
Summary Bar	4
Action Bar	4
HEADERS	4
Column Headers	4
Filter Bar	5
Multi-Value Filter	5
Clear Filter	6
Search	6
Column Options	7
Adjust Columns Displayed	9
Full Screen Visibility	9
HOME VIEW	9
DEFAULT SHIP DATE	9
DEFAULT DECISION DATE	10
PIPELINE CHARTS	10
CATALOG	11
Browse	11
Search	12
ACT ON SELECTED	13
PRODUCT NAVIGATION	14
PRODUCT DETAILS	15
CONTACTS	16
EDIT CONTACT DETAILS	16
ADDRESSING	17
Add a New Contact Address	17
VIEW CONTACT DASHBOARD	18
OPPORTUNITIES	20
CREATE A NEW OPPORTUNITY	20
SPLIT AN OPPORTUNITY & SAVE AND CLONE AN OPPORTUNITY	22
EDIT AN OPPORTUNITY	23
ADD OPPORTUNITY CONTACTS	25
MANAGE EXISTING CONTACTS	26
ADD SAMPLE PRODUCTS	27
REMOVE PRODUCTS	28
UNFORECAST PRODUCTS	29
CLOSE AN OPPORTUNITY	29
SAMPLING	30
SAMPLE AN EXISTING OPPORTUNITY	30
SAMPLE A NEW OPPORTUNITY	31
SAMPLE SUPPLEMENTS	32
SAMPLING SHIPMENT OPTIONS	33
CREATE/REQUEST SSO ACCOUNT	34
EXPORTING	29

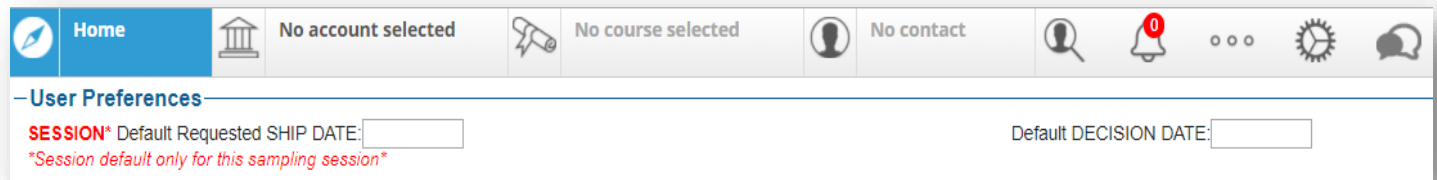
Views, Bars & Headers

There are three (3) groups of Magellan views:

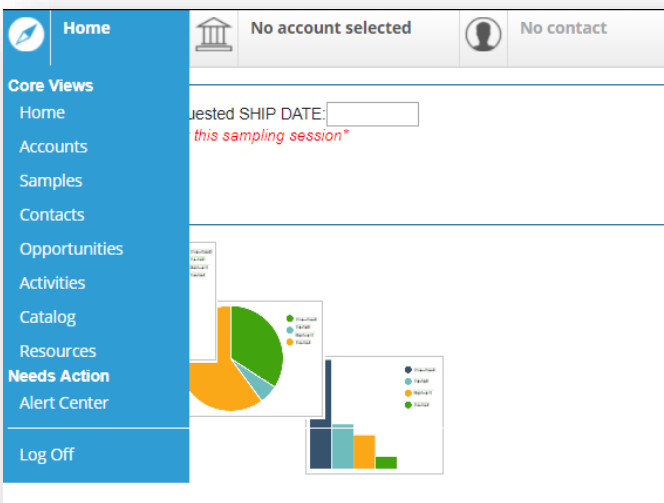
View	Description
Core	A collection of views that represent information shared across the user's territory. For example, a list of all accounts, or all samples regardless of account association.
Account	A collection of views specific to the selected account.
Contact	A collection of views specific to the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



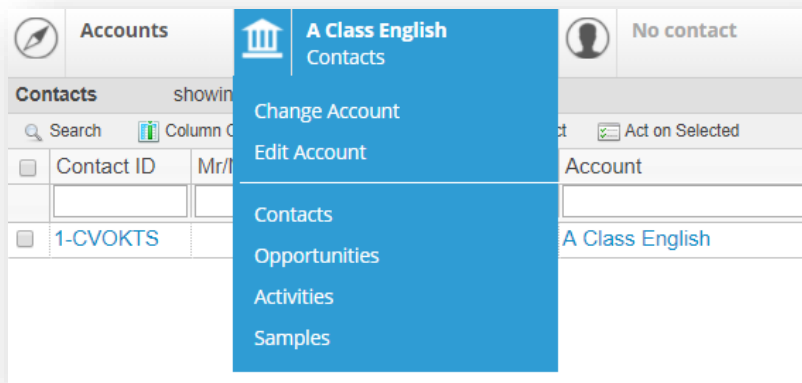
Once your mouse is positioned over the button an expanded list of views is presented: -



- **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

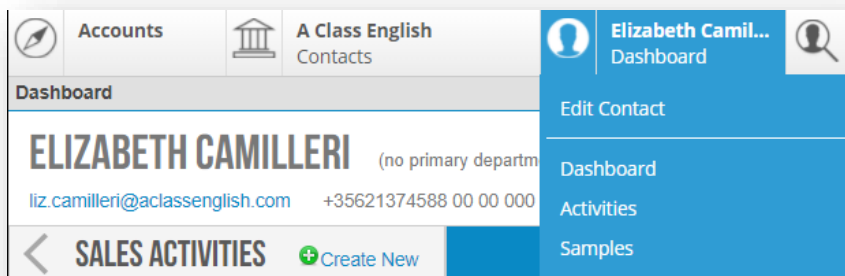
Additional account views may be available by hovering the cursor over on the left-hand side of the Accounts tab...



- **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...

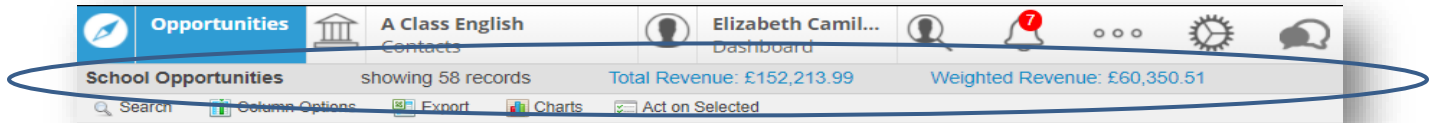


- **Edit Contact** – This takes the User through to the Edit Contact screen.
- **Dashboard** – Takes you back to the Contact Dashboard.
- **Samples** – List of Samples raised against the Contact.

BARS

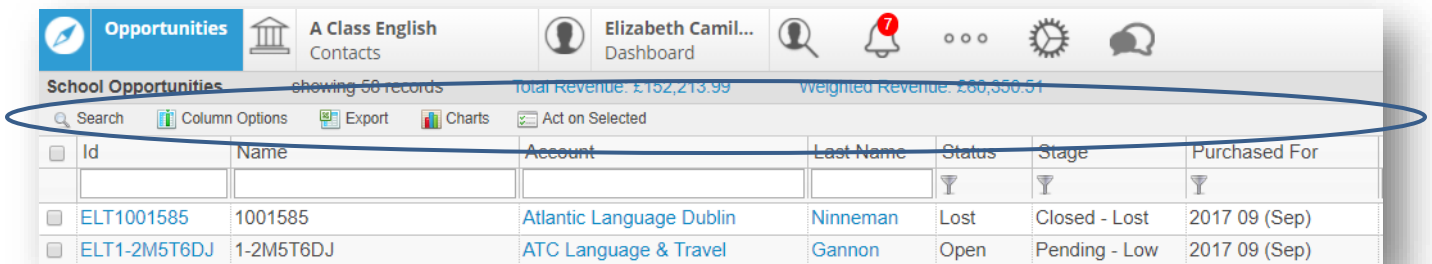
Summary Bar

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.



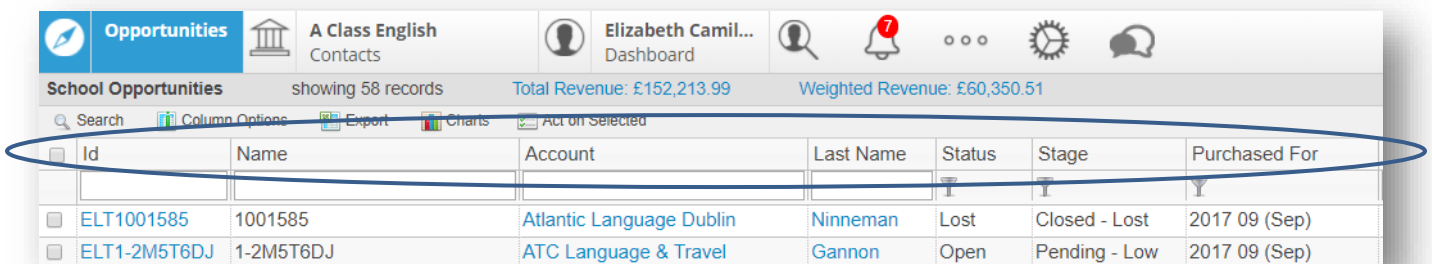
Action Bar

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

The screenshot shows a CRM interface with a table of 'School Opportunities'. The table has columns: Id, Name, Account, Last Name, Status, Stage, and Purchased For. A blue oval highlights the header row. The table shows two rows of data:

Id	Name	Account	Last Name	Status	Stage	Purchased For
ELT1001585	1001585	Atlantic Language Dublin	Ninneman	Lost	Closed - Lost	2017 09 (Sep)
ELT1-2M5T6DJ	1-2M5T6DJ	ATC Language & Travel	Gannon	Open	Pending - Low	2017 09 (Sep)

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:

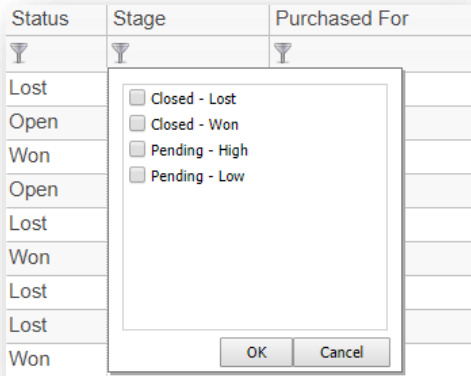
Criteria	Use
=	Equal to
<	Less than
>	Greater than
<>	Not equal to
<=	Less than or equal to
>=	Greater than or equal to
IS NULL	Searches for blank fields
IS NOT NULL	Searches for nonblank fields

Multi-Value Filter

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

Status	Stage	Purchased For

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.



Clear Filter

GREEN – shows you have applied in a filter.

Opportunities

A Class English
Contacts

Elizabeth Camil...
Dashboard

7

School Opportunities

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

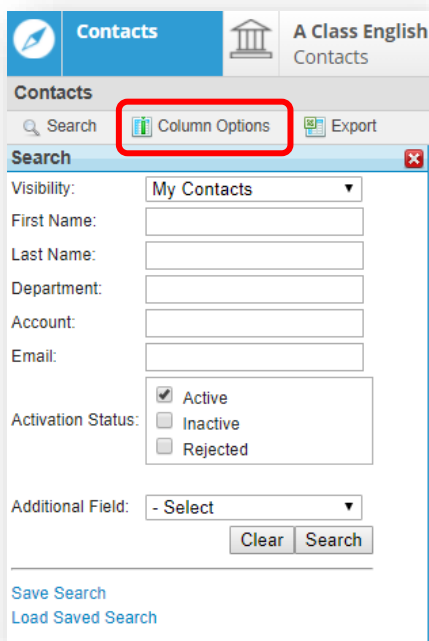
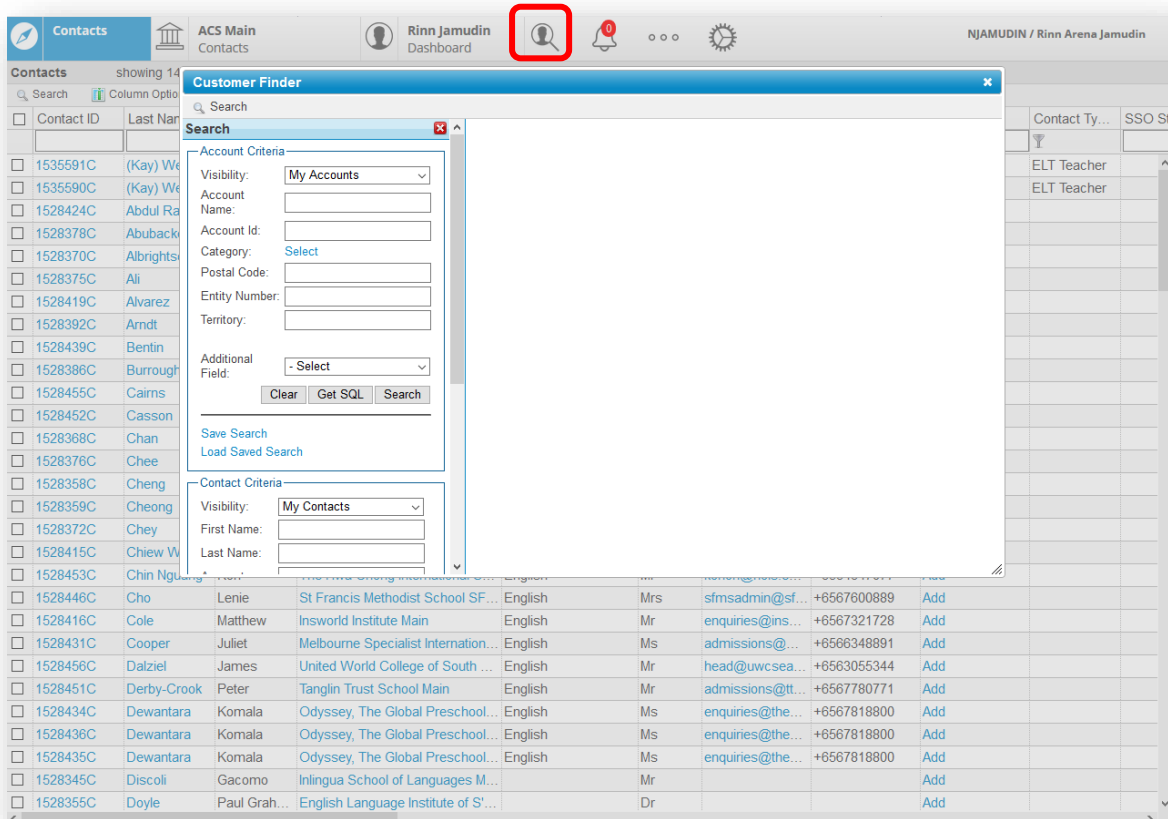
<input type="checkbox"/>	Id	Name	Account	Last Name	Status	Stage	Purchased For
<input type="checkbox"/>							
<input type="checkbox"/>	ELT1-2M5T6DJ	1-2M5T6DJ	ATC Language & Travel	Gannon	Open	Pending - Low	2017 09 (Sep)
<input type="checkbox"/>	ELT1-2HPC3BV	1-2HPC3BV	Brasshouse Centre	Henderson	Open	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.

Column Options

Columns Displayed | **Column Order**

<input checked="" type="checkbox"/> Contact ID	<input checked="" type="checkbox"/> City
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> ST/Prov
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Postal Code
<input checked="" type="checkbox"/> Account	<input checked="" type="checkbox"/> Country
<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Country
<input checked="" type="checkbox"/> Mr/Ms	<input type="checkbox"/> Location
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Created
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Account Type
<input type="checkbox"/> Office Hours	<input checked="" type="checkbox"/> Do Not Email
<input type="checkbox"/> Class Schedule	<input checked="" type="checkbox"/> Do Not Mass Email
<input checked="" type="checkbox"/> Contact Type	<input type="checkbox"/> Last Contacted Date
<input type="checkbox"/> Job Title	<input type="checkbox"/> Activity Code
<input type="checkbox"/> Author	<input type="checkbox"/> Key Contact
<input type="checkbox"/> Competitive Author	<input type="checkbox"/> Reviewer
<input type="checkbox"/> Activation Status	<input type="checkbox"/> Hot Date
<input type="checkbox"/> Inactivation Reason	<input type="checkbox"/> Creator Login
<input type="checkbox"/> Organization	<input type="checkbox"/> Name
<input checked="" type="checkbox"/> SSO Status	<input type="checkbox"/> Faculty Partner
<input checked="" type="checkbox"/> Street Address 1	
<input checked="" type="checkbox"/> Street Address 2	

Other Columns - NOTE: Displaying the columns below may impact view performance

☐ Comments




Reset Columns to Defaults Cancel OK

Column Options

Columns Displayed | **Column Order**

Contact ID	⬆ ⬇ ⬆
Mr/Ms	⬆ ⬇ ⬆
First Name	⬆ ⬇ ⬆
Last Name	⬆ ⬇ ⬆
Account	⬆ ⬇ ⬆
Department	⬆ ⬇ ⬆
Street Address 1	⬆ ⬇ ⬆
Street Address 2	⬆ ⬇ ⬆
Country	⬆ ⬇ ⬆
Email	⬆ ⬇ ⬆
Contact Type	⬆ ⬇ ⬆
Do Not Mass Email	⬆ ⬇ ⬆
Phone	⬆ ⬇ ⬆
City	⬆ ⬇ ⬆
Postal Code	⬆ ⬇ ⬆
Country	⬆ ⬇ ⬆
Account Type	⬆ ⬇ ⬆
Do Not Email	⬆ ⬇ ⬆
SSO Status	⬆ ⬇ ⬆

Reset Columns to Defaults Cancel OK

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.

 Home
  A Class English
Contacts
  Elizabeth Camil...
Dashboard

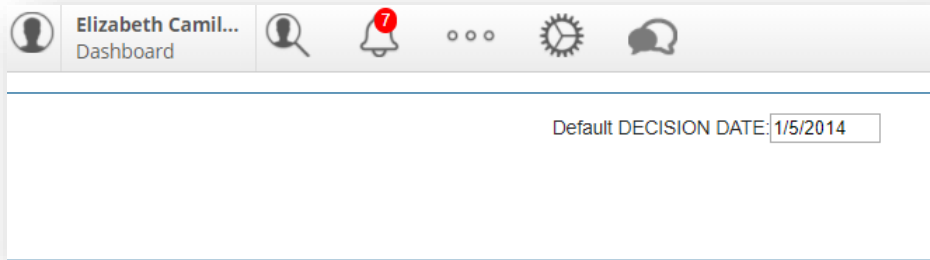
— User Preferences —

SESSION* Default Requested SHIP DATE:

Session default only for this sampling session

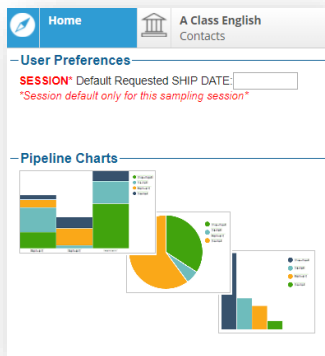
Default Decision Date

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.



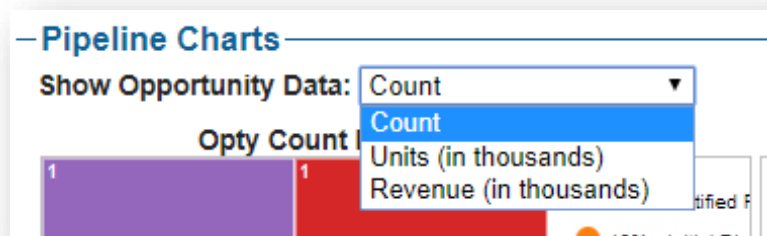
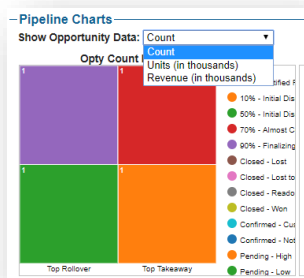
Pipeline Charts

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

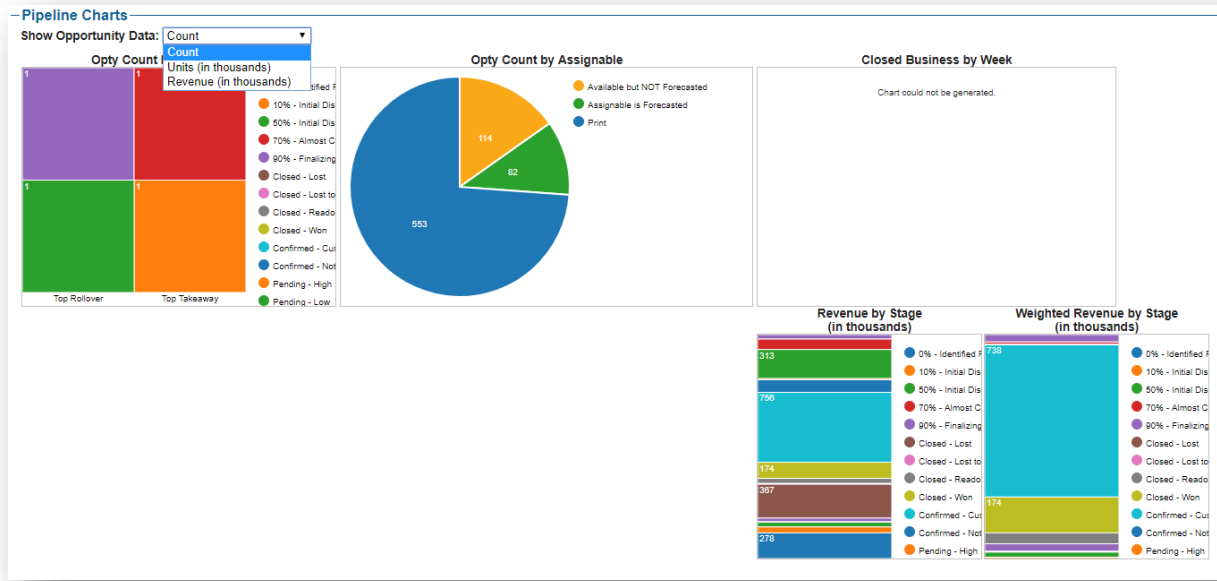


If you click anywhere on the charts that appear, more details are displayed. The drop-down list box at the top of the charts section allows you to view data by:

- 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.

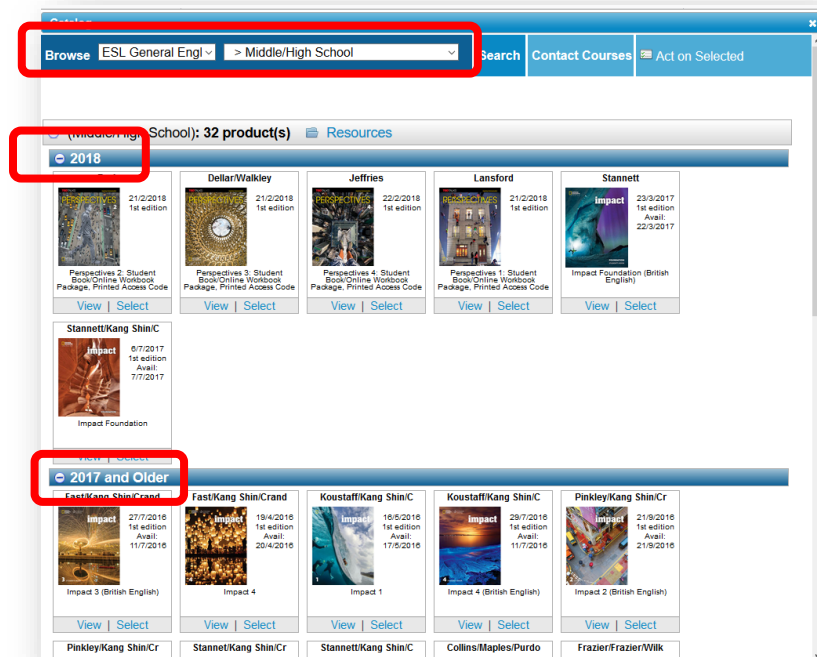


Catalog

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.



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 web catalog interface. At the top, there is a search bar with the text 'Search Title: 21st centu' and a red box around the search button. Below the search bar, the results are grouped by copyright year. The first group is for the year 2018, showing one product by Douglas/TED. The second group is for '2017 and Older', showing ten products by Baker/Blass and Blass/Baker. Each product entry includes a cover image, the publisher (CENGAGE Learning), the title, the edition (1st edition), the availability date, and a 'View | Select' link.

Catalog

Browse Search Title: 21st centu Author: ISBN: Go Contact Courses Act on Selected

(Middle/High School): 66 product(s)

2018

DOUGLAS/TED

6/7/2018
1st edition

CENGAGE Learning

21ST CENTURY CREATIVE THINKING, LISTENING AND SPEAKING

View | Select

2017 and Older

Baker/Blass

2/9/2016
1st edition
Avail: 5/9/2016

CENGAGE Learning

21st Century Communication 1: Listening, Speaking and Critical Thinking

View | Select

Baker/Blass

17/11/2016
1st edition
Avail: 18/11/2016

CENGAGE Learning

21st Century Communication 1: Listening, Speaking and Critical Thinking, Online Workbook, Printed Ac.

View | Select

Blass/Baker

2/9/2016
1st edition
Avail: 9/9/2016

CENGAGE Learning

21st Century Communication 1: Listening, Speaking and Critical Thinking, Student Book with Online Wo

View | Select

Blass/Baker

2/9/2016
1st edition
Avail: 8/9/2016

CENGAGE Learning

21st Century Communication 2: Listening, Speaking and Critical Thinking, Student Book with Online Wo

View | Select

Blass/Baker

8/11/2016
1st edition
Avail: 18/11/2016

CENGAGE Learning

21st Century Communication 3: Listening, Speaking and Critical Thinking, Student Book with Online Wo

View | Select

Blass/Baker

16/11/2016
1st edition
Avail: 18/11/2016

CENGAGE Learning

21st Century Communication 4: Listening, Speaking and Critical Thinking, Student Book with Online Wo

View | Select

Blass/Baker

29/11/2017
1st edition
Avail: 1/12/2017

CENGAGE Learning

21st Century Communication 4: Classroom Presentation Tool USB

View | Select

Blass/Baker

1/12/2017
1st edition
Avail: 1/12/2017

CENGAGE Learning

21st Century Communication 2: Classroom Presentation Tool USB

View | Select

Blass/Baker

1/12/2017
1st edition
Avail: 1/12/2017

CENGAGE Learning

21st Century Communication 1: Classroom Presentation Tool USB

View | Select

Blass/Baker

1/12/2017
1st edition
Avail: 1/12/2017

CENGAGE Learning

21st Century Communication 3: Classroom Presentation Tool USB

View | Select

The screenshot shows a web catalog interface. At the top, there is a search bar with the text 'Search Title: Author: ISBN: Go' and a red box around the ISBN field. Below the search bar, the results are grouped by copyright year. The first group is for the year 2018, showing one product by Douglas/TED. The second group is for '2017 and Older', showing ten products by Baker/Blass and Blass/Baker. Each product entry includes a cover image, the publisher (CENGAGE Learning), the title, the edition (1st edition), the availability date, and a 'View | Select' link.

Catalog

Browse Search Title: Author: ISBN: Go Contact Courses Act on Selected

No products were found

Multi-ISBN Search

Enter ISBNs separated by commas, spaces, new lines or tabs.
Dashes will be ignored.

9781305089556
9781305089549
9781305089532
9781305089525

Close Clear Search

The result by ISBN filter.

The screenshot shows a web application titled 'Catalog'. At the top, there is a navigation bar with a 'Browse' button and a search section containing 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 navigation bar, a status bar indicates '(- Clusters / Courses): 4 product(s)'. A filter bar below that shows '2015 and Older'. The main content area displays four product cards. Each card includes a book cover, the author(s), the title, the edition, the availability date, and a 'View | Select' link at the bottom.

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

Act on Selected

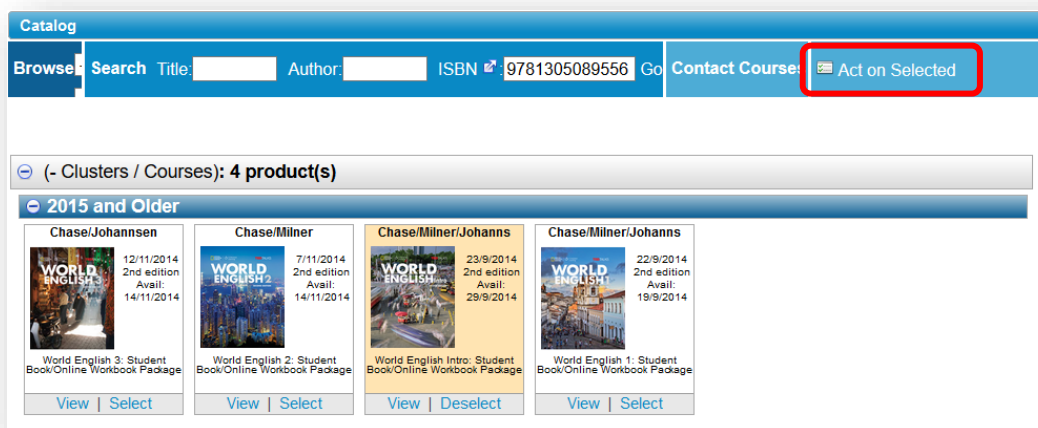
Any product can be 'opened' so that product detail is available in its own pop-up window. However, there is a 'Select' link on every product. Once selected, the link is renamed to 'Unselect'. The purpose of this link is to allow you to select multiple products (without using the Ctrl or Select keys on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



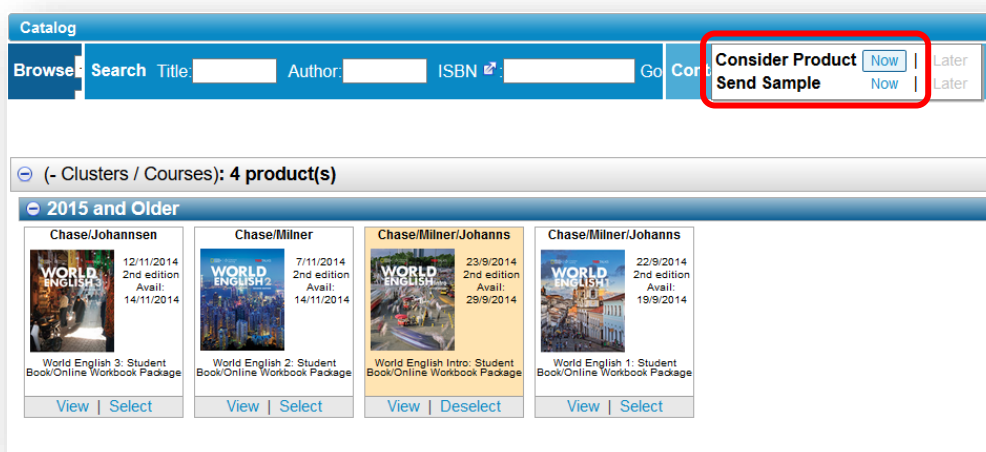
1. From the contact dashboard, select the '**Catalog**' Contact View.
2. Use the '**Select**' links to select one or more products.

This screenshot is identical to the one above, but with a red rectangle highlighting the 'Select' link in the bottom right product card (World English 1).

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

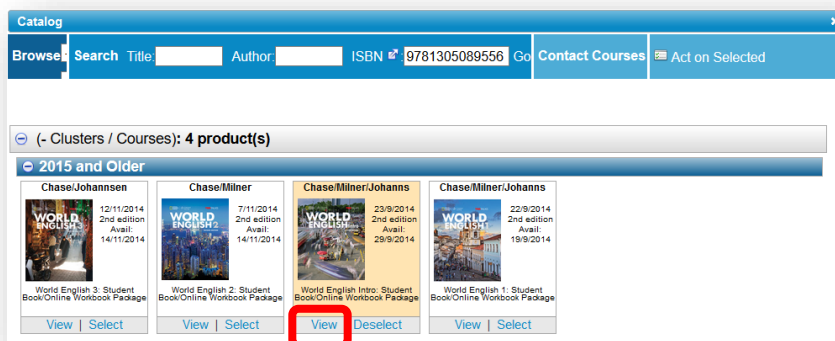


4. Click the **'Now'** link to either create a new opportunity or sample.

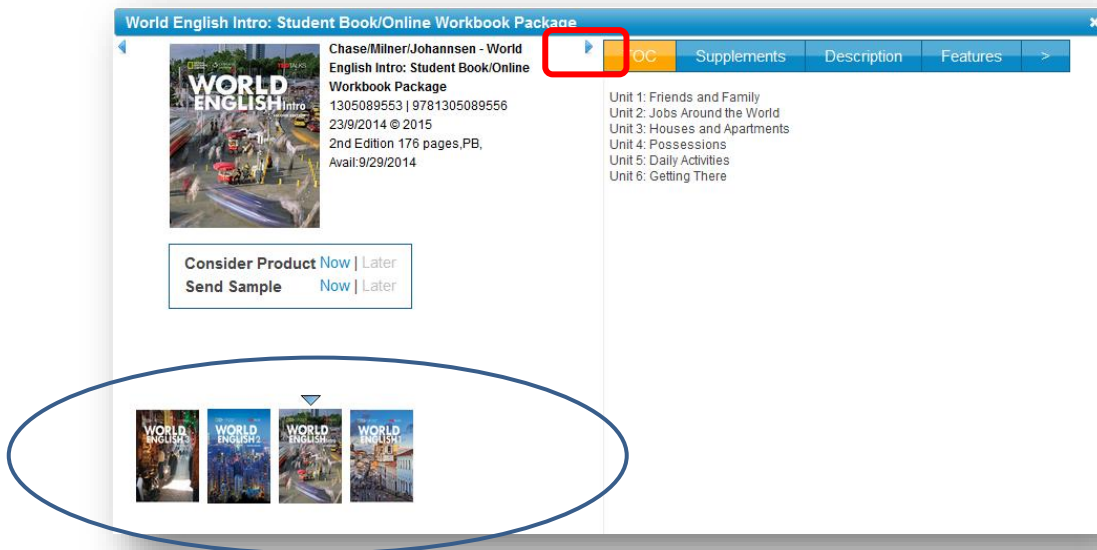


Product Navigation

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:

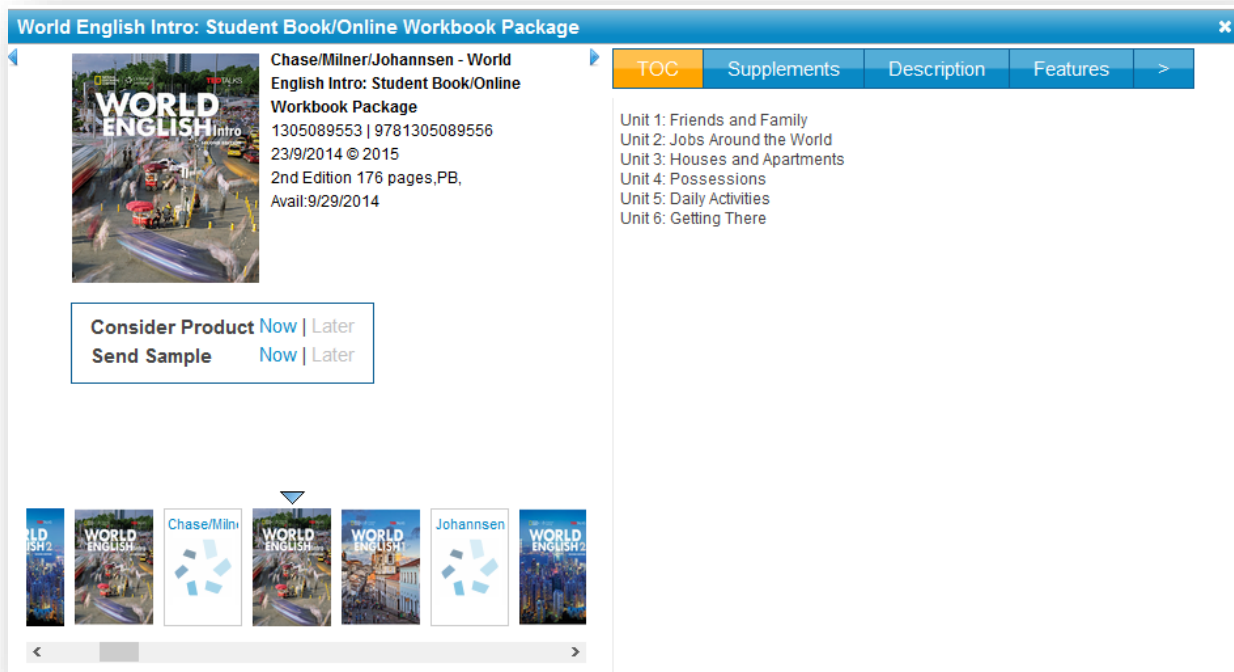


Or click on any piece of cover art displayed at the bottom of the products details popup.



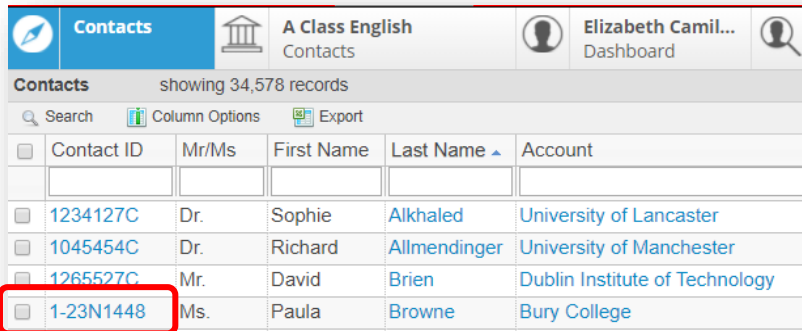
Product Details

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.



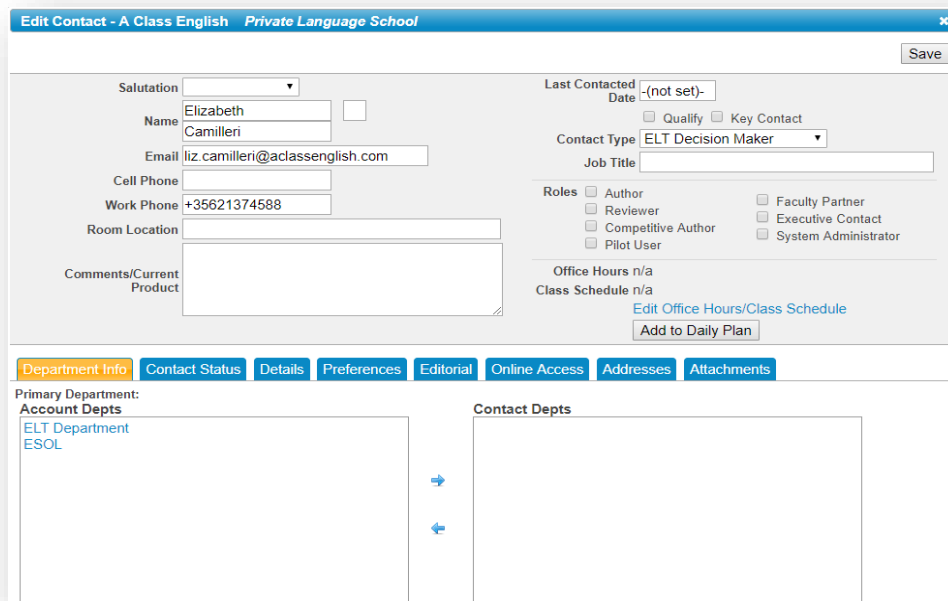
CONTACTS

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



Edit Contact - A Class English Private Language School

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

Last Contacted Date: -(not set)-
☐ Qualify ☐ Key Contact
Contact Type: ELT Decision Maker
Job Title:

Roles: ☐ Author ☐ Faculty Partner
☐ Reviewer ☐ Executive Contact
☐ Competitive Author ☐ System Administrator
☐ Pilot User

Office Hours: n/a
Class Schedule: n/a
[Edit Office Hours/Class Schedule](#)
[Add to Daily Plan](#)

[Save](#)

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.

The screenshot shows the 'Addresses' tab selected in a contact record. The tab bar at the top includes 'Department Info', 'Contact Status', 'Details', 'Preferences', 'Editorial', 'Online Access', 'Addresses' (highlighted with a red box), and 'Attachments'. Below the tabs, the 'Primary Department: Account Depts' section lists 'ELT Department' and 'ESOL'. To the right, the 'Contact Depts' section is empty. Two blue arrows point between the two sections.

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

The screenshot shows the 'Addresses' tab with two business card-style address cards. The left card is for 'Account' and lists 'University Malta', 'University Services Ltd', 'Msida, MSD 06', and 'Malta'. It has an 'Edit Address' link and a 'Mark as Default' link. The right card is for 'Department' and lists 'Chemistry Dept., Faculty of Science', 'University Services Ltd', 'Msida, MSD 06', and 'Malta'. It has an 'Edit Address' link and a 'Default Address' link.

The screenshot shows the 'Save Address' pop-up window. It has a 'Department' dropdown set to 'Chemistry Dept., Faculty of Science'. The form fields include 'Address' (University Services Ltd), 'Other Info' (two empty fields), 'City' (Msida), 'State/Province' (Please Select a State/Prov -), 'Postal Code' (MSD 06), and 'Country' (Malta). There are 'Save and Close' and 'Save' buttons at the top right.

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.

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.

The screenshot shows the top navigation bar with 'Contacts' and 'ACS Main Contacts' tabs. The user profile 'Rinn Jamudin' is selected, showing a 'Dashboard' tab. Below the navigation bar, the contact details for Rinn Jamudin are displayed: 'Rinn Jamudin Edit Add Note Priority: rinnarena.jamudin@cengage.com | 64101287 | Office: English | Office Hours: n/a'. The 'Edit' link is highlighted with a red box. Below the details, there is a link to 'SSO: Create SSO Account'.

The Contact Dashboard has 4 different tabs.

The screenshot shows the top navigation bar with 'Contacts' and 'Overseas Family School...' tabs. The user profile 'Suzanne Bentin' is selected, showing a 'Dashboard' tab. Below the navigation bar, the contact details for Suzanne Bentin are displayed: 'Suzanne Bentin Edit Add Note Priority: suzanne_bentin@ofs.edu.sg | +6567380211 | Office: n/a | Office Hours: n/a'. Below the details, there are three tabs: 'Active Opportunities', 'Samples in the Last 18 Months', and 'Tech Support'. The 'Active Opportunities' tab is selected, showing 'Show All Opportunities | Create New Opty/Sample' and 'No active opportunities found for this contact'. The 'Samples in the Last 18 Months' tab shows 'Send Sample' and 'No sample history found for this contact'. The 'Tech Support' tab shows 'Magellan Asia Tech Support: Asia.techsupport@cengage.com' and '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.

The screenshot shows the 'Rinn Jamudin Dashboard' with a navigation bar at the top. The 'Active Opportunities' section is visible, and the 'Create New Opty/Sample' link is highlighted with a red rectangle. Below this, a 'Sample TESTING' section displays details for a specific opportunity, including its stage, revenue, sales period, and a list of products.

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.

The screenshot shows the 'Create Opportunity: Open A Class English' form. The 'Opty Name' and 'Sales Period' fields are highlighted with red rectangles. The form includes various input fields for opportunity details, a table for products, and a sidebar with contact information.

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:**

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:

[Act on Selected](#) [Format Layout](#) **Tax:** £0.00 **Tax %:** **S&H:** \$0 **S&H%:** [Add / Sample Products](#)

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

Contact(s): - [Add Contacts](#)
[Elizabeth Camilleri](#)

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 & Close

Opity Detail **Other** Opity ID: NE

Opity Name: * Expiration Date: Contact(s): - Add Contact
Elizabeth Camilleri

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: 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								

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 ESL Listening & S > Listening & Speaking - Key Titles ▼ Search Consider Product Now Later
Send Sample Now Later

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

2018


Chase

 8/1/2018
2nd edition
Avail: 13/12/2017

Pathways Listening, Speaking, and Critical Thinking 1

[View](#) | [Select](#)


Dellar/Walkley

 21/2/2018
1st edition

Perspectives 3: Student Book/Online Workbook Package, Printed Access Code

[View](#) | [Deselect](#)

Fettig/Najafi


 12/1/2018
2nd edition
Avail: 13/12/2017

Pathways Listening, Speaking, and Critical Thinking Foundations

[View](#) | [Select](#)

2017 and Older

Baker, Blass

 2/9/2016
1st edition
Avail: 5/9/2016

21st Century Communication 1: Listening, Speaking and Critical Thinking

[View](#) | [Select](#)


Blass/Baker

 8/11/2016
1st edition
Avail: 18/11/2016

21st Century Communication 3: Listening, Speaking and Critical Thinking Student Book with Online Wo

[View](#) | [Select](#)

Blass/Baker

 16/11/2016
1st edition
Avail: 18/11/2016

21st Century Communication 4: Listening, Speaking and Critical Thinking Student Book with Online Wo

[View](#) | [Select](#)

Blass/Baker

 2/9/2016
1st edition
Avail: 9/9/2016

21st Century Communication 1: Listening, Speaking and Critical Thinking Student Book with Online Wo

[View](#) | [Select](#)

Blass/Baker

 2/9/2016
1st edition
Avail: 8/9/2016

21st Century Communication 2: Listening, Speaking and Critical Thinking Student Book with Online Wo

[View](#) | [Select](#)

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
<input type="checkbox"/>	Simply Grammar: English Grammar for Beginners : English Grammar for Beginners Years 7-11 REYNOLDS 1st Edition Cengage Learning Australia ©2005 9781869467166	View Supplements	Comments	Subheading
<input type="checkbox"/>	Making a rabbit Giles/Randell/Smith 1st Edition Cengage Learning Australia ©2000 9780170095488	View Supplements	Comments	Subheading
<input type="checkbox"/>	The Bird That Could Think Smith 1st Edition Cengage Learning Australia ©2001 9780170097536	View Supplements	Comments	Subheading
<input checked="" type="checkbox"/>	Bersama-sama lagi Teacher Audio CDs Clarke/Day/Hardie 2nd Edition Cengage Learning Australia ©2005 9780170119207	View Supplements	Comments	Subheading
<input checked="" type="checkbox"/>	Nelson Essential Geography Skills Workbook Naumann/Davidson/Matthews 2nd Edition Cengage Learning Australia ©2016 9780170367073	View Supplements	Comments	Subheading

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

Act on Selected		Format Layout	Add / Sample Products	
<input type="checkbox"/>	Bulk Field Update	16697	View Supplements	Comments
<input checked="" type="checkbox"/>	Split Opportunity			
<input type="checkbox"/>	Unforecast Selected			
<input type="checkbox"/>	Forecast Selected			
<input type="checkbox"/>	Remove Products			
<input type="checkbox"/>	Update Net Prices			
<input type="checkbox"/>	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
<input type="checkbox"/>	FITNESS AND HEALTH - MINI ANTHOLOGY 24 MINI GUIDE 1st Edition Nelson Education Ltd. ©1994 9780176043964	View Supplements	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
<input type="checkbox"/>	Making a rabbit Giles/Randell/Smith 1st Edition Cengage Learning Australia ©2000 9780170095488	View Supplements	Comments	Subheading
<input type="checkbox"/>	The Bird That Could Think Smith 1st Edition Cengage Learning Australia ©2001 9780170097536	View Supplements	Comments	Subheading
<input checked="" type="checkbox"/>	Bersama-sama lagi Teacher Audio CDs Clarke/Day/Hardie 2nd Edition Cengage Learning Australia ©2005 9780170119207	View Supplements	Comments	Subheading
<input checked="" type="checkbox"/>	Nelson Essential Geography Skills Workbook Naumann/Davidson/Matthews 2nd Edition Cengage Learning Australia ©2016 9780170367073	View Supplements	Comments	Subheading

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.

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	21st Century Communication 1: Listening, Speaking and Critical Thinking 1st Edition 1st Edition	Life Beginner Student's Book with App Code 2nd Edition 2nd Edition	KEYWORDS FOR JAPAN TODAY Edition Edition
Published: No Stage: Pending - Low Revenue: \$195.80 Units: 24 Sales Period: 2018 05 (May) Follow-up: 24 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
SPLIT OPPORTUNITY Published: No Stage: Pending - Low Revenue: \$187.25 Units: 2 Sales Period: 2018 05 (May) Follow-up: 2 item(s) in opty Edit/Sample 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.

Contacts showing 2 of 141 records after filtering [Clear Filter](#)

Search [Column Options](#) [Export](#)

Contact ID	Last Name	First Name	Account	Department	Mr/Ms	Email	Phone	Office Hours	Contact Ty...	SSO St
<input type="checkbox"/>	Jamudin	Rinn	ACS Main	English	Miss	rinnarena.jamu...	64101287	Add	Administrator	
<input type="checkbox"/>	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

0

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: \$195.80 Units: 24 Sales Period: 2018 05 (May) Follow-up: 24 item(s) in opty Edit/Sample Opty Id: 3336359	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 4th 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 Edit/Sample Opty Id: 3331808	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 9780170367073	
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: 3332637	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

Add Opportunity Contacts

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

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area: Baker, Blass

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:

Act on Selected Format Layout Add / Sample Products

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, Blass 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

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

Select Contacts

Filter Contacts: Create Contact

☐ Burrough, Rob: English +6564721477

☒ Jamudin, Rinn: English Administrator 64101287 Office: English

☒ Rinn, Test: (No Department Found) Administrator

Contacts to Add: 1

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

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

Edit Contact - ACS Main

Salutation: Name: Email: Cell Phone: Work Phone: Room Location: Comments:

Last Contacted Date: (not set)

☐ Quality ☐ Key Contact ☐ ELT Contact

Contact Type: Job Title:

Roles: ☐ Author ☐ Faculty Partner ☐ Reviewer ☐ Executive Contact ☐ Competitive Author ☐ Pilot User

Office Hours n/a Class Schedule n/a

Edit Office Hours/Class Schedule Add to Daily Plan

Department Info Contact Status Details Preferences Editorial Online Access Addresses Attachments

Primary Department: Account Depts: English

Contact Depts:

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

Manage Existing Contacts

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area:

Cancel Save & Create Another Opty Save & Close

Opty Detail Other Opty ID: 3536359

Opty Name: * Expiration Date: **Contact(s): - Add Contacts**

Sales Stage: Units: 24 Revenue: \$195.80 Weighted Revenue: \$48.95 **Rinn Jamudin**

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

Type (Important!):

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

Follow up Action:

Class Start Date:

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

Opty ID: 2893909

15/9/2018 **Contact(s): - Add Contacts**

7.00 Weighted Revenue: £11.75

(View/Edit)

- 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.

Create Opportunity: Open Overseas Family School Main

Cengage Standard Subject Area:

Cancel Save & Create Another Opty Save & Close

Opty Detail Other Opty ID: **NEW**

Opty Name: * Expiration Date:

Sales Stage: Units: 0 Revenue: \$0.00 Weighted Revenue: \$0.00

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

Type (Important!):

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

Follow up Action:

Class Start Date:

Act on Selected Format Layout **Add / Sample Products**

X	Qty	Product	Local Price	Price	Discont Pct	Disc Price	Ext Price
No products found							

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.

Catalog

Browse > Search Consider Product Send Sample

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

2018

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

2017 and Older

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

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
ding 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
pp Hughes/Dummett/Stephenson 2nd Edition CENGAGE ELT ©2019 9781337905626 View Supplements Comments Subheading	\$40.88	\$42.95	30	\$30.06	\$30.06
munication 1: Listening, Speaking and Critical Thinking: Student Book with Online Wo Edition CENGAGE ELT ©2017 9781337275804 View Supplements Comments Subheading	\$65.63	\$68.95	30	\$48.26	\$48.26
ediate Student's Book with App Code Dummett/Hughes/Stephenson 2nd Edition CENGAGE ELT 86121 View Supplements Comments Subheading	\$52.97	\$38.95		\$38.95	\$38.95
The Flying Tree Ellis 1st Edition Cengage Learning Australia ©2008 9780170136150 View Supplements Comments Subheading	\$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

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

	Local Price	Price	Discnt Pct	Disc Price	Ext Price
ding 2: Creative Thinking and Reading with TED Talks Longshaw/Blass/Vargo/Yeates 1st Edition	\$52.31	\$54.95	30	\$38.46	\$38.46
2015 9781305265707 Primary View Supplements Comments Subheading					
op Hughes/Dummett/Stephenson 2nd Edition CENGAGE ELT ©2019 9781337905626	\$40.88	\$42.95	30	\$30.06	\$30.06
ts Comments Subheading					
ommunication 1: Listening, Speaking and Critical Thinking: Student Book with Online Wo	\$65.63	\$68.95	30	\$48.26	\$48.26
dition CENGAGE ELT ©2017 9781337275804 View Supplements Comments Subheading					
ediate Student's Book with App Code Dummett/Hughes/Stephenson 2nd Edition CENGAGE ELT	\$52.97	\$38.95		\$38.95	\$38.95
86121 View Supplements Comments Subheading					
The Flying Tree Ellis 1st Edition Cengage Learning Australia ©2008 9780170136150 View Supplements	\$10.27	\$7.55		\$7.55	\$7.55
Comments Subheading					

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.

View/Edit Opportunity: Open ACS Main

Cengage Standard Subject Area:

Opty ID: 2893909

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

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%

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

Contact(s): - Add Contacts

Elizabeth Camilleri

Richard Clarke

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

Sample an Existing Opportunity



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

Act on Selected		Format Layout	Tax: £0.00 Tax %:	S&H: \$0.00	S&H%:	Add / Sample Products			
X	Qty	Gratis	Product	S&H %	Price	Discont 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	

2. 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				
Bulk Field Update					S&H %	Price	Discont Pct	Disc Price	Ext Price
Split Opportunity	Explorer 1 with Audio CD : English for Short Courses Hill 1st Edition ©2011 9781111400590 Primary					£16.50		£16.50	£16.50
	Supplements Comments Subheading								
Unforecast Selected	er-Intermediate Workbook Without Key and Audio CD Dummett 2nd Edition ©2019 9781337286299					£17.00		£17.00	£17.00
Forecast Selected	nts Subheading								
Remove Products	er-Intermediate Combo Split B with App Code and Workbook Audio CD Dummett/Hughes/Stephenson					£25.00		£25.00	£25.00
	on ©2019 9781337286251 View Supplements Comments Subheading								
Update Net Prices	Intermediate Student's Book with App Code Hughes/Stephenson/Dummett 2nd Edition ©2019					£30.00		£30.00	£30.00
	285704 View Supplements Comments Subheading								
Sample									

3. Using the check boxes provided, select the contact(s) you want to sample.
4. 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

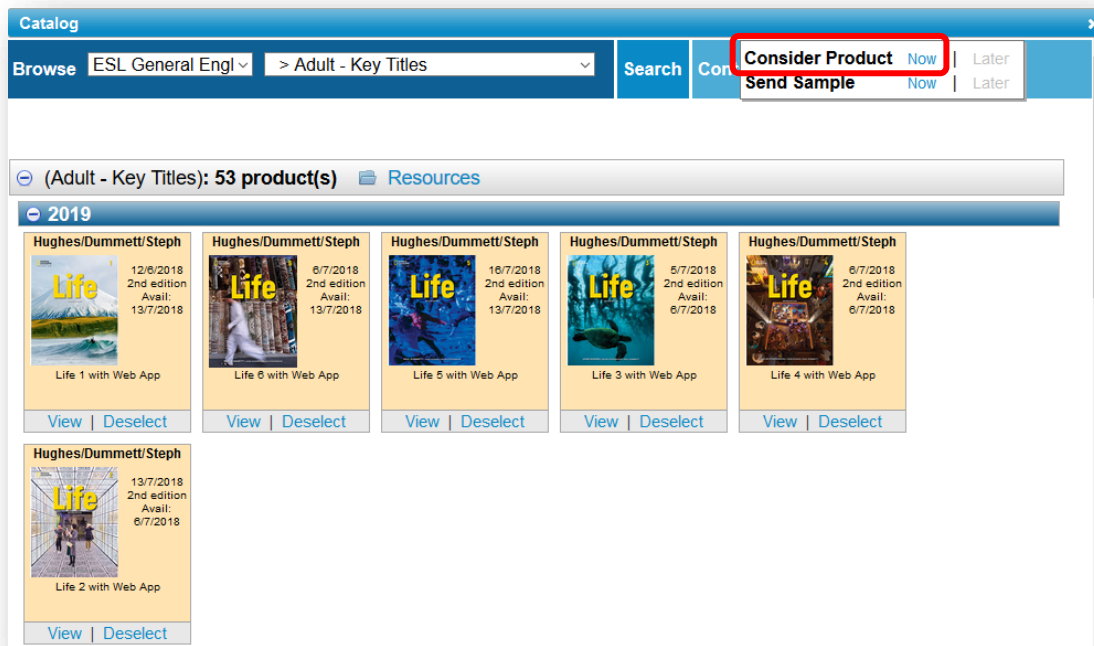
Supplements

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

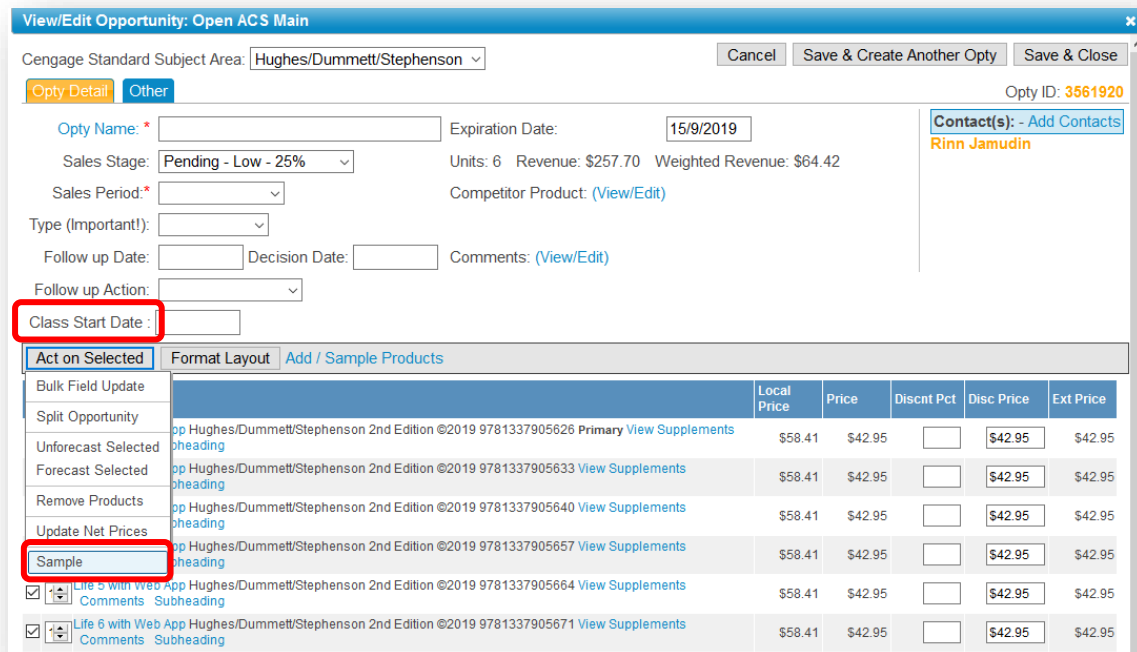
Sample a New Opportunity



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'**.



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



- 5.

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

The screenshot shows a window titled '1: Sample Options' with two tabs: '1 Sample Options' and '2 Confirm/Edit Addresses'. The 'Sample Options' tab is active. On the left, there is a dropdown menu for 'Sample Type *' with options 'Sample Type *', 'Review Copy', and 'Desk Copy'. The 'Review Copy' option is highlighted. To the right of the dropdown is a blue button. Further right, there are two sample entries. Each entry has a 'Create Sample' button, a 'Quantity' field with the value '1', and a 'Supplements' section with a plus icon. The first sample entry is for 'Student Edition Blass/Baker 21st Century Communication 1: Listening, Speaking and Critical Thinking: Student Book with Online Wo 9781337275804 2/9/2016' by Miss Rinn Jamudin. The second sample entry is for 'Student Edition Hughes/Dummett/Stephenson Life 1 with Web App 9781337905626 12/6/2018'.

- 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' tab selected. On the left, there is a 'Contacts' section with checkboxes for Elizabeth Camilleri and Richard Clarke. To the right, there are two sample entries. Each entry has a 'Create Sample' button, a 'Supplements' section with a plus icon, and a 'Supplements' section with a plus icon. The first sample entry is for 'Student Edition Dummett Life Upper-Intermediate Workbook Without Key and Audio CD 9781337286299 1/1/2018'. The second sample entry is for 'Student Edition Hughes/Stephenson/Dummett Life Pre-Intermediate Student's Book with App Code 9781337285704 1/1/2018'.

- 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

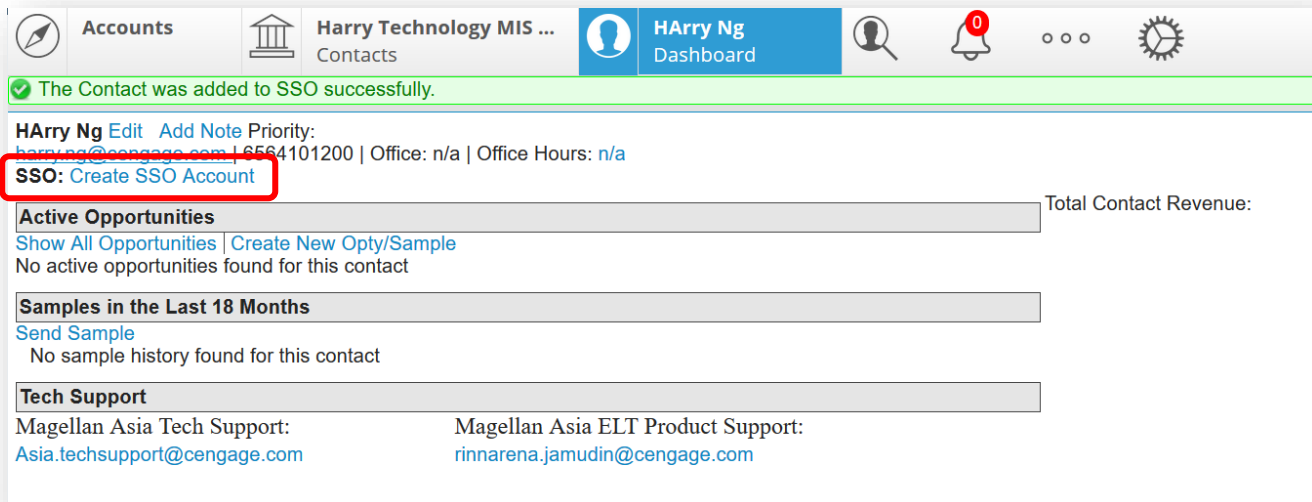
DSU
DSU3
DSWM
DSAI
DSFX
EX-SGD1
EX-SGF1
EX-SGIF
EX-SGYF
EX-SGFH
EX-SGML
EX-SGK3
HS
DSAH

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.



Accounts Harry Technology MIS ... Harry Ng Dashboard

✓ The Contact was added to SSO successfully.

Harry Ng Edit Add Note Priority:
harry.ng@cengage.com | 6564101200 | Office: n/a | Office Hours: n/a

SSO: Create SSO Account

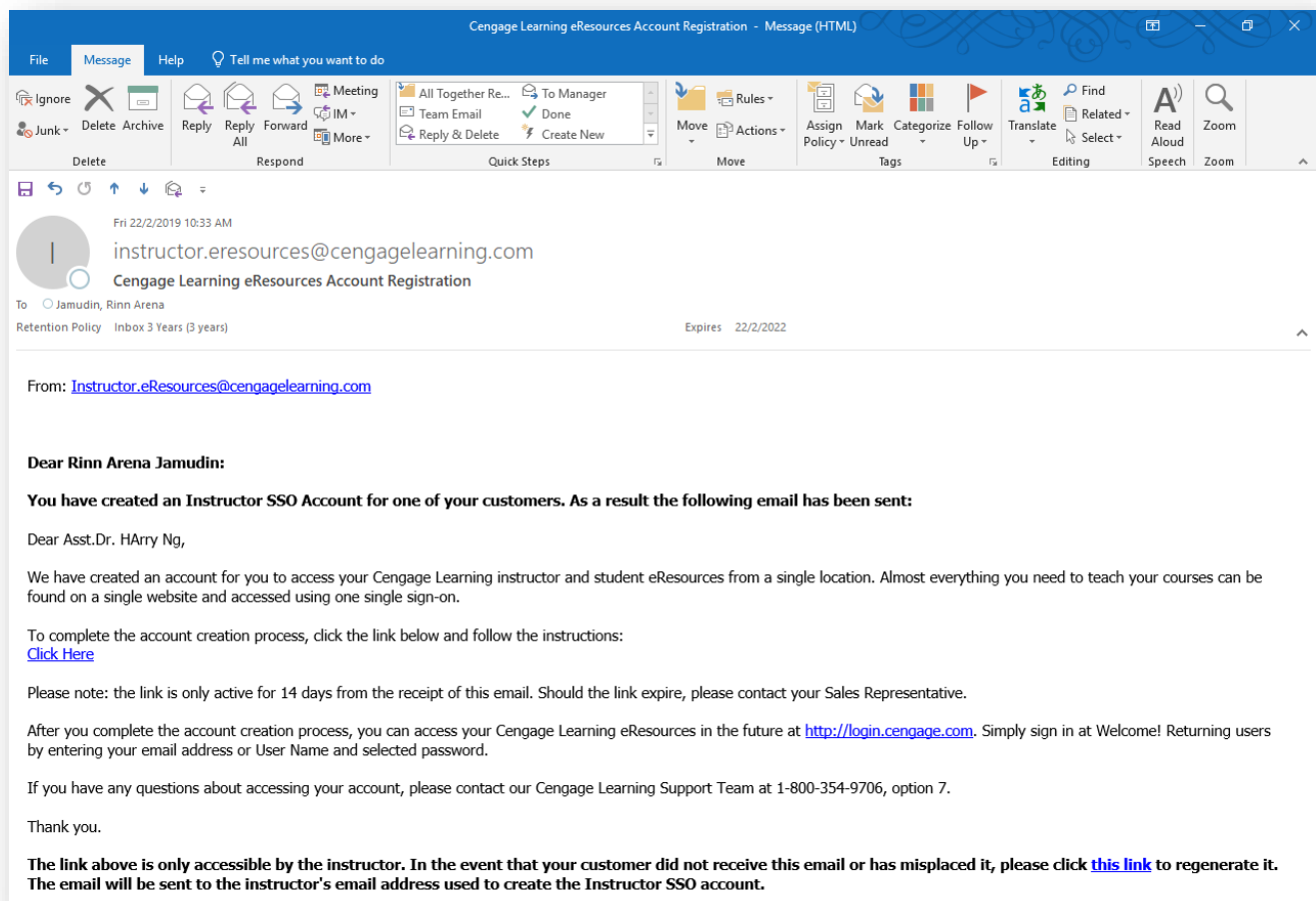
Total Contact Revenue:

Active Opportunities
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

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



Cengage Learning eResources Account Registration - Message (HTML)

File Message Help Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward More Meeting IM Team Email Reply & Delete All Together Re... To Manager Done Create New Rules Move Actions Assign Mark Categorize Follow Up Translate Find Read Aloud Zoom

Fri 22/2/2019 10:33 AM

instructor.eresources@cengagelearning.com

Cengage Learning eResources Account Registration

To: Jamudin, Rinn Arena

Retention Policy: Inbox 3 Years (3 years) Expires: 22/2/2022

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.

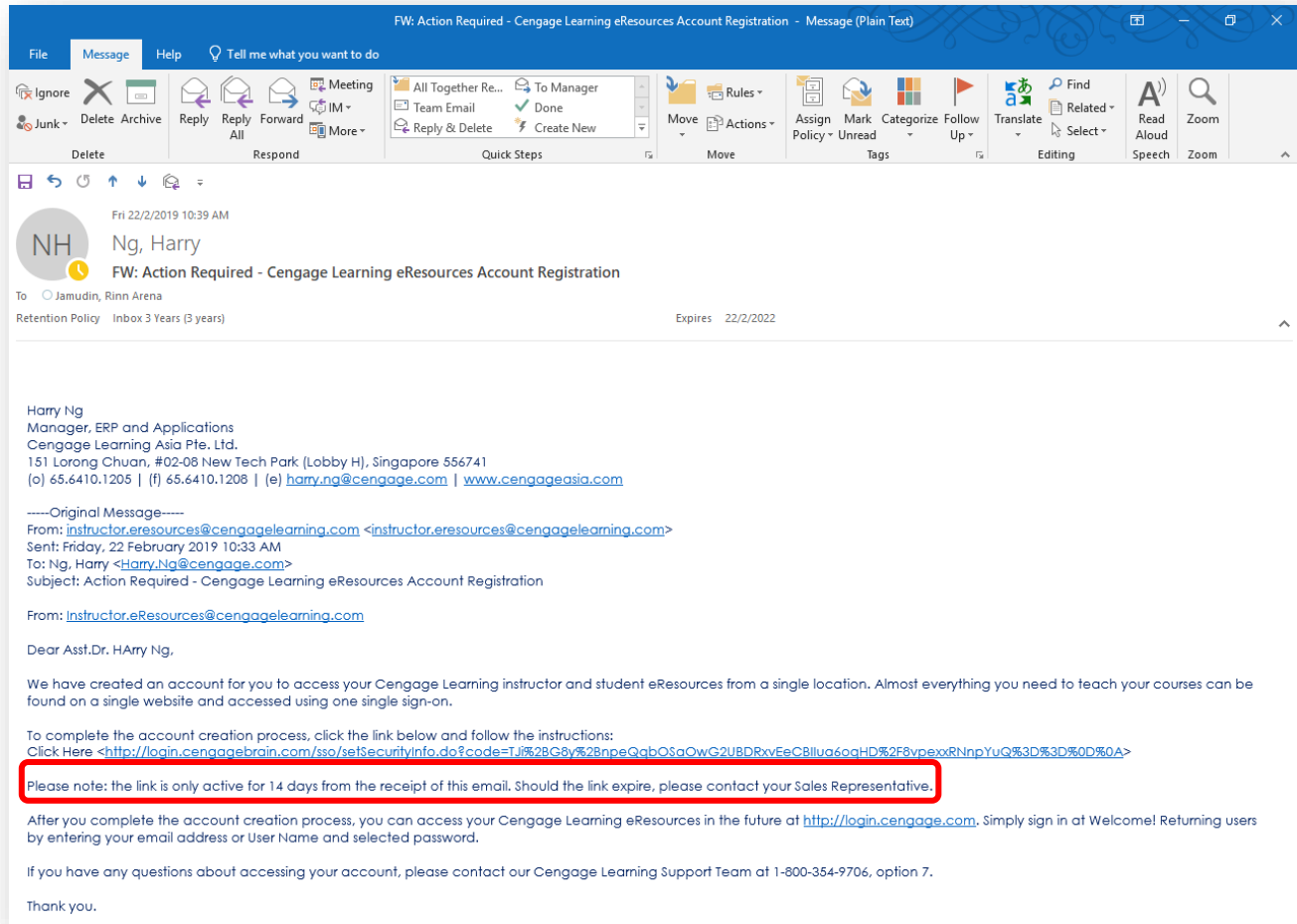
If you have any questions about accessing your account, please contact our Cengage Learning Support Team at 1-800-354-9706, option 7.

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.

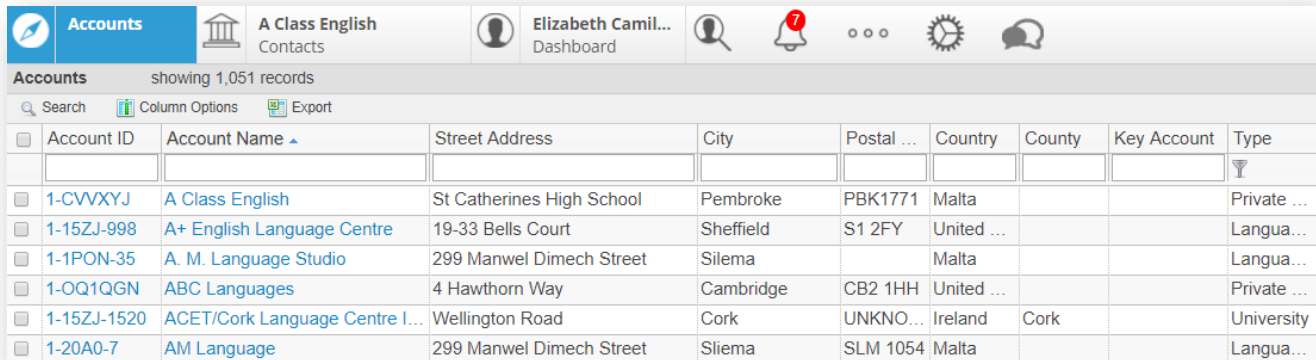
3. At the same time, the teacher/instructor will receive an email from instructor.eresources@cengagelearning.com to inform that we have created an instructor's account for him and provided a simple instruction on how to complete the process.

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's a navigation bar with 'Accounts' selected, a user profile for 'Elizabeth Camil...', and various icons. Below the navigation bar, a header indicates 'Accounts showing 1,051 records'. A toolbar contains 'Search', 'Column Options', and 'Export' buttons. The main area displays a table with columns: Account ID, Account Name, Street Address, City, Postal, Country, County, Key Account, and Type. The table lists several language centers, including 'A Class English', 'A+ English Language Centre', 'A. M. Language Studio', 'ABC Languages', 'ACET/Cork Language Centre', and 'AM Language'.

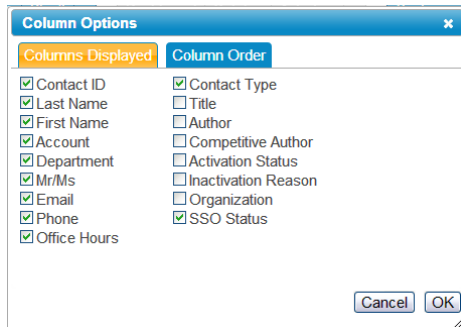
Account ID	Account Name	Street Address	City	Postal	Country	County	Key Account	Type
1-CVVXYJ	A Class English	St Catherines High School	Pembroke	PBK1771	Malta			Private ...
1-15ZJ-998	A+ English Language Centre	19-33 Bells Court	Sheffield	S1 2FY	United ...			Langua...
1-1PON-35	A. M. Language Studio	299 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.

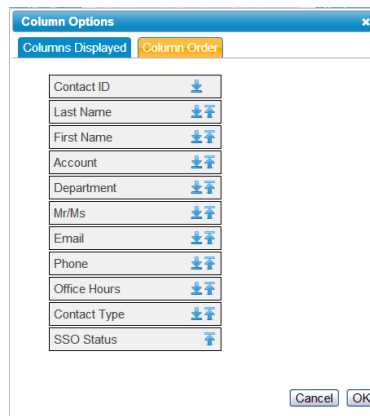
Optional: apply a filter to the view.

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. The first column lists fields to be displayed, and the second column lists fields to be hidden. The 'Contact ID' checkbox is checked. The 'Contact Type' checkbox is also checked. The 'SSO Status' checkbox is checked. The 'Cancel' and 'OK' buttons are at the bottom right.

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	



The 'Column Options' dialog box is shown with the 'Column Order' tab selected. It displays a list of fields with up and down arrows next to them, allowing the user to rearrange the order of the columns. The fields are: Contact ID, Last Name, First Name, Account, Department, Mr/Ms, Email, Phone, Office Hours, Contact Type, and SSO Status. The 'Cancel' and 'OK' buttons are at the bottom right.

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

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.