salesforce
champion
Region's Summary

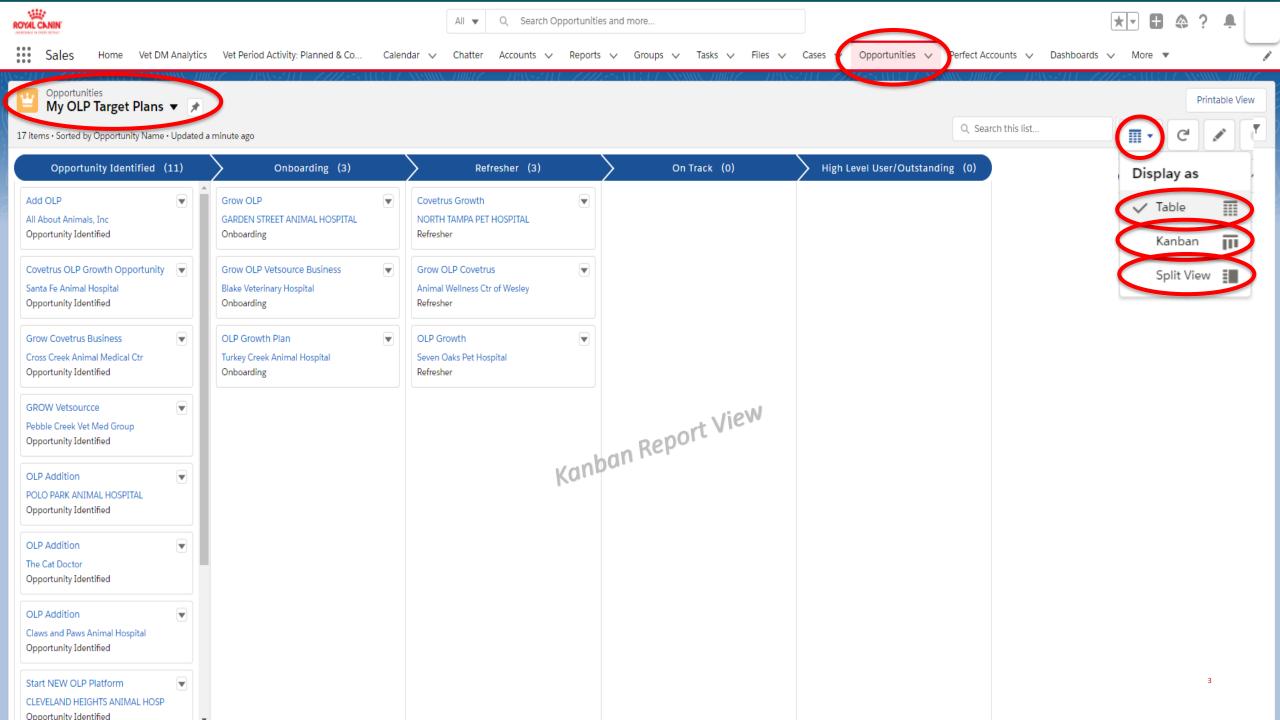# CASE REASON UPDATES

NEW

- B2B Help
  - D2C Error –
    - For any errors or questions related to the D2C platform (shop.royalcanin.com)
  - Credit Card Error –
    - To be used if a customer encounters issues adding/checking out with a credit card. Ex Customer attempts to add in CC but the page doesn't respond
  - Application Error –
    - To be used if there is an error with an application
  - Block/Unblock Username -
    - To be used for reactivating or deactivating a username on b2b

- Finance
  - Credit Limit Review
    - If a customer would like to have their account credit limit reviewed.
  - High Radius Issue
    - The customer is getting an SSO error when redirected or they are not seeing an invoice or payment.

Opportunities
My OLP Target Plans ▾ 📌

Printable View

17 items • Sorted by Opportunity Name • Filtered by My team's opportunities - Close Date, Closed, Owner Last Name • Updated a few seconds ago

🔍 Search this list...   ⚙▾ ▦▾ ↻ ✏ 📊 ▼

	Opportunity Name ↑	Account Name	Stage	Target	Diet Category	Team Resour...	Close Date	Target Quarter	Owner First ...	Owner Last Na...	
1	Add OLP	All About Animals, Inc	Opportunity Identified				11/26/2021 »		Dennis	Alexander	▼
2	Covetrus Growth	NORTH TAMPA PET HOSPITAL	Refresher				12/7/2021		Dennis	Alexander	▼
3	Covetrus OLP Growth Opportunity	Santa Fe Animal Hospital	Opportunity Identified				11/19/2021		Dennis	Alexander	▼
4	Grow Covetrus Business	Cross Creek Animal Medical Ctr	Opportunity Identified				11/16/2021		Dennis	Alexander	▼
5	Grow OLP	GARDEN STREET ANIMAL HOSPITAL	Onboarding				12/17/2021		Dennis	Alexander	▼
6	Grow OLP Covetrus	Animal Wellness Ctr of Wesley	Refresher				11/5/2021		Dennis	Alexander	▼
7	Grow OLP Vetsource Business	Blake Veterinary Hospital	Onboarding				10/8/2021		Dennis	Alexander	▼
8	GROW Vetsourcce	Pebble Creek Vet Med Group	Opportunity Identified				11/22/2021		Dennis	Alexander	▼
9	OLP Addition	POLO PARK ANIMAL HOSPITAL	Opportunity Identified				6/14/2021		Dennis	Alexander	▼
10	OLP Addition	The Cat Doctor	Opportunity Identified				8/13/2021		Dennis	Alexander	▼
11	OLP Addition	Claws and Paws Animal Hospital	Opportunity Identified				10/8/2021		Dennis	Alexander	▼
12	OLP Growth	Seven Oaks Pet Hospital	Refresher				10/4/2021		Dennis	Alexander	▼
13	OLP Growth Plan	Turkey Creek Animal Hospital	Onboarding				5/18/2021		Dennis	Alexander	▼
14	Start NEW OLP Platform	CLEVELAND HEIGHTS ANIMAL HOSP	Opportunity Identified				12/10/2021		Dennis	Alexander	▼
15	Start OLP	Allendale Animal Health Center	Opportunity Identified				11/15/2021		Dennis	Alexander	▼
16	Start OLP Business	Advanced Veterinary Services	Opportunity Identified				7/15/2021		Dennis	Alexander	▼
17	Vetsource Growth	SAN ANTONIO ANIMAL HOSPITAL	Opportunity Identified				12/15/2021		Dennis	Alexander	▼

Table Report View

ROYAL CANIN

All ▾   Search Opportunities and more...

Sales   Home   Vet DM Analytics   Vet Period Activity: Planned & Co...   Calendar ▾   Chatter   Accounts ▾   Reports ▾   Groups ▾   Tasks ▾   Files ▾   Cases ▾   Opportunities ▾   Perfect Accounts ▾   Dashboards ▾   Contacts ▾   More ▾

Recently Viewed ▾

24 items • Updated a few seconds ago

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OLP Growth	Seven Oaks Pet Hospital
Refresher	10/4/2021
Add OLP	All About Animals, Inc
Opportunity Identified	11/26/2021 »
Grow OLP Covetrus	Animal Wellness Ctr of Wesley
Refresher	11/5/2021
NVA webinar target-All Creatures Animal-Dennis	
	All Creatures Animal Clinic
Opportunity Identified	7/30/2021
Start NEW OLP Platform	
	CLEVELAND HEIGHTS ANIMAL HOSP
Opportunity Identified	12/10/2021
Covetrus OLP Growth Opportunity	
	Santa Fe Animal Hospital
Opportunity Identified	11/19/2021
GROW Vetsourcce	Pebble Creek Vet Med Group
Opportunity Identified	11/22/2021
Covetrus Growth	NORTH TAMPA PET HOSPITAL
Refresher	12/7/2021
Grow Covetrus Business	Cross Creek Animal Medical Ctr
Opportunity Identified	11/16/2021
Start OLP	Allendale Animal Health Center
Opportunity Identified	11/15/2021
Start OLP Business	Advanced Veterinary Services
Opportunity Identified	7/15/2021
Vetsource Growth	SAN ANTONIO ANIMAL HOSPITAL
Opportunity Identified	12/15/2021
Grow OLP	GARDEN STREET ANIMAL HOSPITAL
Onboarding	12/17/2021

Opportunity
OLP Growth

+ Follow   Edit   Delete   Printable View ▾

| Account Name | Close Date | Opportunity Owner |
| Seven Oaks Pet Hospital | 10/4/2021 | Dennis Alexander |

✓ — ✓ — Refresher — On Track — Closed   ✓ Mark Stage as Complete

Details   Related

∨ Account Info

Account Name	Seven Oaks Pet Hospital	Website	https://sevenoakspet.com/
Region Name	Brady, Greg	Phone	(813) 929-4100
Classification	Core	Hospital Contact for OLP	Marymargaret S
#FTEs	4.00		

∨ Opportunity Details

Opportunity Name	OLP Growth	Stage	Refresher
Current OLP Utilization	Underutilizing	Probability (%)	50%
Objections		Close Date	10/4/2021

∨ Plan

| High Level OLP Overview | Clinic is under-utilizing Covetrus at -49.3% Approx $5000 going to PP | High Level OLP Challenges | |
| OLP Strategy | OLP Training Growth Contest | OLP Results Achieved | Training Completed 5/28/2021 |

Split View Report

Activity   Chatter

🔧 Open Activities (3)

SEND OLP Packet
Name:
Task: ☑
Due Date: 6/7/2021

OLP/Nutrition Champion
Name: Katherine Hesten
Task: ☑
Due Date: 6/17/2021

Q3 OLP Target Contest Ends
Name: Katherine Hesten
Task: ☑
Due Date: 9/10/2021

View All

Opportunity
OLP Growth

Create a Task/Event attached to an Opportunity

Account Name	Close Date	Opportunity Owner
Seven Oaks Pet Hospital	10/4/2021	👤 Dennis Alexander 👤

✓ ——— ✓ ——— ✓ ——— | Refresher | On Track | Closed | ✓ Mark Stage as Complete

Details **Related**

🔧 Open Activities (3)   New Task   New Event

Subject	Name	Task	Due Date
SEND OLP Packet		☑	6/7/2021
OLP/Nutrition Champion	Katherine Hesten	☑	6/17/2021
Q3 OLP Target Contest Ends	Katherine Hesten	☑	9/10/2021

View All

🔧 Activity History (3)   View All

Subject	Name	Task	Due Date
TRAINING OLP COMPLETED		☐	5/28/2021
TRAINING OLP Covetrus with POS Materials...		☐	5/28/2021
Training Request Follow Up		☑	5/19/2021

View All

👥 Opportunity Team (0)   Add Default Team   Add Opportunity Team Members

🔧 Open Activities (3)   ▼

SEND OLP Packet
Name:
Task: ☑
Due Date: 6/7/2021

OLP/Nutrition Champion
Name: Katherine Hesten
Task: ☑
Due Date: 6/17/2021

Q3 OLP Target Contest Ends
Name: Katherine Hesten
Task: ☑
Due Date: 9/10/2021

View All

If created here, they will also show in your activity feed on the account page, not just in the OLP open activities feed.

If not "Related to" an OLP opportunity, they will not appear in this feed.

Task Screen Examples:

▼ Additional Information

Subject	Q3 OLP Target Contest Ends		Related To	OLP Growth
Type	Phone Call		Name	Katherine Hesten

Subject	Create QR labels for OLP Cards		Related To	Seven Oaks Pet Hospital
Type	Order Placement		Name	