

# Opportunity Stage Mapping Configuration

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## Stage Mapping Reference

Loan Stage (cCLoanStage)	Kanban Column (stage)	Color
Application Created	Prospecting	Blue (info)
Document Collection	Qualification	Gray (default)
Credit Assessment	Qualification	Blue (primary)
Security Valuation	Proposal	Blue (primary)
Pending Approval - Branch	Proposal	Orange (warning)
Pending Approval - Regional	Proposal	Orange (warning)
Pending Approval - Committee	Proposal	Orange (warning)
Approved - Agreement Pending	Negotiation	Green (success)
Agreement Signed	Negotiation	Green (success)
Pending Disbursement	Negotiation	Green (success)
Disbursed - Won	Closed Won	Green (success)
Rejected - Lost	Closed Lost	Red (danger)
Cancelled - Lost	Closed Lost	Red (danger)

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# Configuration Components

## 1. Loan Stage Field (cCLoanStage)

**Location:** Administration → Entity Manager → Opportunity → Fields → Loan Stage

### Field Properties:

- Type: Enum
- Name: cCLoanStage
- Label: Loan Stage
- Display As Label: Yes
- Audited: Yes

## 2. Auto-Mapping Workflow

**Location:** Administration → Workflows

**Workflow Name:** Opportunity: Map Loan Stage to Kanban Stage

### Configuration:

- Entity Type: Opportunity
- Trigger: After Record Saved
- Condition: Loan Stage is not empty
- Action: Execute Formula (maps Loan Stage to standard Stage)

## 3. Layout Configuration

### Kanban Card Display:

- Location: Administration → Entity Manager → Opportunity → Layouts → Kanban
- Add "Loan Stage" field to show detailed stage on each card

### Detail View:

- Location: Administration → Entity Manager → Opportunity → Layouts → Detail
  - Loan Stage appears in Overview panel
  - Standard Stage moved to Side Panel (read-only reference)
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# UI Configuration Procedures

## Procedure 1: Modify Loan Stage Options

1. Navigate to **Administration** → **Entity Manager**
2. Click **Opportunity**
3. Click **Fields** tab
4. Click **Loan Stage** (cCLoanStage)
5. Modify the **Options** list as needed
6. Click **Save**
7. Go to **Administration** → **Rebuild**

## Procedure 2: Change Stage Colors

1. Navigate to **Administration** → **Entity Manager**
2. Click **Opportunity**
3. Click **Fields** tab
4. Click **Loan Stage** (cCLoanStage)
5. In the Options section, each option has a color dropdown
6. Select appropriate color for each stage:
  - **default** (gray) - Neutral/waiting states
  - **info** (blue) - New/initial states
  - **primary** (dark blue) - In-progress states
  - **warning** (orange) - Pending/attention required
  - **success** (green) - Positive/completed states
  - **danger** (red) - Negative/failed states
7. Click **Save**
8. Go to **Administration** → **Rebuild**

## Procedure 3: Add Loan Stage to Kanban Cards

1. Navigate to **Administration** → **Entity Manager**
2. Click **Opportunity**
3. Click **Layouts**
4. Click **Kanban** in the left sidebar
5. Drag **Loan Stage** from Disabled to Enabled section
6. Arrange field order (recommended: Name, Loan Stage, Amount)
7. Click **Save**
8. Go to **Administration** → **Rebuild**

## Procedure 4: Modify Detail View Layout

1. Navigate to **Administration** → **Entity Manager**

2. Click **Opportunity**
3. Click **Layouts**
4. Click **Detail**
5. Drag fields to arrange:
  - Add **Loan Stage** to Overview panel
  - Move **Stage** to Side Panel Fields if needed
6. Click **Save**
7. Go to **Administration → Rebuild**

## Procedure 5: Update Stage Mapping Workflow

If loan stage options change, update the workflow formula:

1. Navigate to **Administration → Workflows**
2. Find "**Opportunity: Map Loan Stage to Kanban Stage**"
3. Click to edit
4. In Actions section, click the formula action
5. Update the mapping logic:

None

```
$ls = cCLoanStage;  
  
ifThen($ls == 'Application Created', stage = 'Prospecting');  
ifThen($ls == 'Document Collection', stage = 'Qualification');  
// ... add/modify mappings as needed
```

6. Click **Save**

## Procedure 6: Configure Side Panel Fields

1. Navigate to **Administration → Entity Manager**
2. Click **Opportunity**
3. Click **Layouts**
4. Click **Side Panel Fields**
5. Add fields to display in right panel:
  - Stage
  - Probability, %
  - Assigned User
  - Created date
6. Click **Save**

# Workflow Formula Reference

The workflow uses EspoCRM formula syntax to map stages:

```
None  
$ls = cCLoanStage;  
  
ifThen($ls == 'Application Created', stage = 'Prospecting');  
ifThen($ls == 'Document Collection', stage = 'Qualification');  
ifThen($ls == 'Credit Assessment', stage = 'Qualification');  
ifThen($ls == 'Security Valuation', stage = 'Proposal');  
ifThen($ls == 'Pending Approval - Branch', stage = 'Proposal');  
ifThen($ls == 'Pending Approval - Regional', stage = 'Proposal');  
ifThen($ls == 'Pending Approval - Committee', stage = 'Proposal');  
ifThen($ls == 'Approved - Agreement Pending', stage = 'Negotiation');  
ifThen($ls == 'Agreement Signed', stage = 'Negotiation');  
ifThen($ls == 'Pending Disbursement', stage = 'Negotiation');  
ifThen($ls == 'Disbursed - Won', stage = 'Closed Won');  
ifThen($ls == 'Rejected - Lost', stage = 'Closed Lost');  
ifThen($ls == 'Cancelled - Lost', stage = 'Closed Lost');
```

## Adding New Loan Stage:

1. Add option to cCLoanStage field (Procedure 1)
2. Add corresponding ifThen statement to workflow (Procedure 5)
3. Rebuild cache

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## Color Reference

Color Code	Appearance	Recommended Use
default	Gray	Neutral, waiting, or secondary states
info	Light Blue	New, informational states
primary	Dark Blue	Active, in-progress states
warning	Orange	Attention needed, pending approval

<b>Color Code</b>	<b>Appearance</b>	<b>Recommended Use</b>
success	Green	Completed, approved, positive outcomes
danger	Red	Rejected, cancelled, negative outcomes