DESIGN Ideas

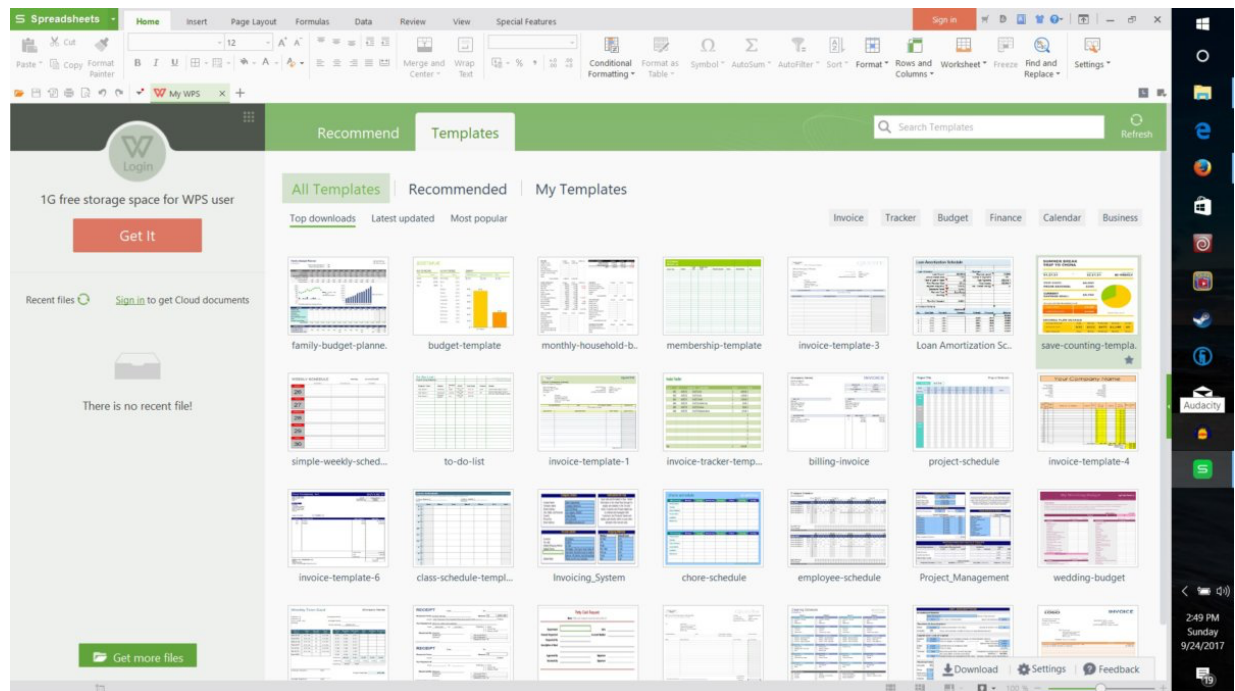NEED TO KNOW REQUIREMENTS === Be the KNOW ALL Guy …
Charts only page(s)?
Plots?
User Profiles/Last Saved Settings?/Portal.
What are those UGLY buttons for?
Database know how … a bit more.

Minimized PRICERS, click to open

Columns

::: Sales   Home   Opportunities ▾   Leads ▾   Tasks ▾   Files ▾   Accounts ▾   Contacts ▾   Campaigns ▾   Dashboards ▾   Reports ▾   More ▾

👑 New Opp 2

[+ Follow]

[New Case] [New Note] [Clone] [▾]

Account Name
ABC Widgets

Close Date
12/13/2018

Amount
$50,000.00

Opportunity Owner
🐻 Sang Kong

S3 Storage

Angel MedFlight - PDF.pdf   [Download]

✓ | Quali... › Need... › Value... › Id. De... › Perce... › P ◀ ▶

Stage: Qualification   [✓ Mark Stage as Complete]

ACTIVITY   **CHATTER**   **DETAILS**

Opportunity Owner 🐻 Sang Kong	**Amount** $50,000.00
Private ☐	**Expected Revenue** $10,000.00
Opportunity Name New Opp 2	**Close Date** 12/13/2018
Account Name ABC Widgets	**Next Step**
Type Existing Customer - Upgrade	**Stage** Qualification
Lead Source Web	**Probability (%)** 20%
	Primary Campaign Source
Order Number	**Main Competitor(s)**
Current Generator(s)	**Delivery/Installation Status**
Tracking Number	
Created By 🐻 Sang Kong, 9/20/2018 9:19 AM	**Last Modified By** 🐻 Sang Kong, 9/20/2018 8:05 PM

Products (0) ▾

Notes & Attachments (1) ▾

📄 Angel MedFlight - PDF
Sep 20, 2018 • 2.4MB • pdf

View All

Contact Roles (0) ▾

Stage History (3) ▾

Stage: Qualification
Amount: $50,000.00
Probabili...   20%
Expected... $10,000.00
Close Date: 12/13/2018
Last Mod...   Sang Kong
Last Mod...   9/20/2018 8:05 PM

Stage: Qualification
Amount: $50,000.00
Probabili...   10%
Expected... $5,000.00

Tabs

Acquisitions   Resources   Fulfillment   Admin   Analytics

Order lines ▾   All ▾   🔍   Advanced ▾

Purchase Order Line Details   Save as template | Reopen | Change Bib Reference | Back | **Save**

$2.00 a Day, HighBridge Audio, 2015,   ⓘ ⌄

| Order Line | POL-7842 | Order | PO-12222 | Status | Closed (2018-01-19) |
| Order line type | Electronic Book - One Time | PO line owner | Main Library | Sent date | 2017/05/02 |

Summary | Description | Alerts | Invoice Lines | Associated PO Lines | Communications | Interested Users | History | Notes | Attachments

Ordered Items ⌄

License   Select from a list   ☰   View license

	Name	Type	Activation Status	Activation Date	Additional PO Line	
1	$2.00 a Day	-	Active	2018/01/19		...

Vendor Information ⌄

Material supplier *   EBSCO Electronic/EBR/EBSCO Electronic   ✕ ☰ View vendor   Access provider

Claiming grace period (days)   0   Expected activation after ordering (days)   0

Or expected activation date   2017/05/02   ✕ 📅   E-Activation due after ordering (days)   30

Pricing

ExLibris   Alma University   QA

★ »   Acquisitions   Resources   Fulfillment   Admin   Analytics

All titles ▾   Keywords ▾   🏠▾   🔍   Advanced ▾

User Details   Toggle Account Type | Cancel | **Save**

Admin User   ⓘ ⌄

| ID | admin | Account Type | Internal | Manage fulfillment activities |
| Record type | Staff | User group | - | |

① General Information | ② Contact Information | ③ Identifiers | ④ Notes | ⑤ Blocks | ⑥ Fines/Fees | ⑦ Statistics | ⑧ Attachments | ⑨ Proxy For | ⑩ Audit

User Information ⌄

First name *   Admin   Middle name

Last name *   User   Preferred first name

Preferred middle name   Preferred last name

Manage Sets   Back

My Sets | **Public Sets** | All Sets

1 - 9 of 9   Name ▾   🔍   ➕ Add Set ▾   ⎘   ⚙

▼ Content Type : All ▾

	Active	Name ▲	Type	Content Type	Created by	Creation Date	
1	🔵	All users	Logical	User	exl_impl	09/07/2016 09:19:21 CDT	...
2	🔵	All users - itemized - 22/09/2016 06:09:22 IDT	Itemized	User	exl_impl	09/21/2016 22:09:31 CDT	...
3	🔵	Identify records that are not used in the Network - Mon Nov 14 06:34:23 UTC 2016	Itemized	All Titles	exl_impl	11/14/2016 24:34:23 CST	...
4	🔵	Identify records that are not used in the Network - Thu Nov 10 09:03:01 UTC 2016	Itemized	All Titles	exl_impl	11/10/2016 03:03:01 CST	...

MENUS ETC

Home | Chatter | Campaigns | Leads | Contacts | Accounts | **Opportunities** | Reports | Dashboards | +

Create New... ▾

Recent Items
- ExpressLogistic...
- Lindsey Barlow
- ExploringWorld.com
- MetroHealth.com
- SolidBranding.com
- Cardinal.net
- Aethna Marketing - Website
- GreenwichMedia.com
- GrandHotels.com
- Burlington.com

Recycle Bin

Opportunity
ExpressLogistics.com

Customize Page | Edit Layout | Printable View | Help for this Page

⊹ Show Feed   Click to add topics:

Open Activities [1] | Activity History [3] | Contact Roles [1] | Campaign Influence [2] | Partners [0] | Stage History [5]

Opportunity Detail   [Edit] [Delete] [Clone]

Opportunity Owner	Lindsey Barlow [Change]	Stage	Closing
Opportunity Name	ExpressLogistics.com	Close Date	7/1/2016
Account Name	ExpressLogistics.com	Probability (%)	90%
Type	NewfangledCMS Site	Amount	$80,000.00

▼ Additional Information

Primary Campaign Source	CTA--Contact Us
Lead Source	Web - Contact Us
Description	

▼ System Information

Created By	Lindsey Barlow, 4/13/2015 1:41 PM	Last Modified By	Lindsey Barlow, 6/21/2016 7:50 AM

[Edit] [Delete] [Clone]

Open Activities   [New Task] [New Event]   Open Activities Help ❓

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit | Cls	Closing check-in	Babara Levy	✓	6/27/2016	Not Started	Normal	Lindsey Barlow

Activity History   [Log a Call] [Mail Merge] [Send an Email] [View All]   Activity History Help ❓

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Send Contract	Babara Levy	✓	5/16/2016	Lindsey Barlow	6/21/2016 7:48 AM
Edit | Del	Web Meeting	Babara Levy	☐	4/11/2016 10:30 AM	Lindsey Barlow	6/21/2016 7:48 AM
Edit | Del	Initial Call	Babara Levy	☐	3/7/2016 9:00 AM	Lindsey Barlow	6/21/2016 7:47 AM

📇 Contact Roles   [New]   Contact Roles Help ❓

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit | Del	Babara Levy	ExpressLogistics.com	b.levy@expressl&t.net	(503) 421-7800	Decision Maker	✓

Campaign Influence   [Add to Campaign]   Campaign Influence Help ❓

Action	Campaign Name	Contact Name	Contact Role	Responded	Primary Campaign Source
Edit | Del	Conference--The Newfangled Seminar--Apr 2015	Babara Levy	Decision Maker	✓	☐
Edit | Del	CTA--Contact Us				✓

Partners   [New]   Partners Help ❓

No records to display

Stage History   Stage History Help ❓

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified
Closing	$80,000.00	90%	$72,000.00	7/1/2016	Lindsey Barlow, 6/21/2016 7:50 AM
Closing	$80,000.00	90%	$72,000.00	10/2/2015	Lindsey Barlow, 10/2/2015 12:47 PM
Closing	$80,000.00	90%	$72,000.00	5/14/2015	Lindsey Barlow, 4/14/2015 11:27 AM
Contract Out	$80,000.00	75%	$60,000.00	5/14/2015	Lindsey Barlow, 4/14/2015 11:26
Value Proposition	$80,000.00	50%	$40,000.00	3/18/2015	Lindsey Barlow, 4/13/2015 1:41

💬 Chat

PAGENATION

SUMMARY VIEW

LEFT NAV:

Horizontal LINES/Splitters and Accordians (better)