

| | | | |
|--------|--------|--|------------|
| | | | Close view |
| Cancel | Button | | |

Navigation Options

Not applicable

Exceptions

None

Notes and Issues

None

Add Opportunity

Functional Description

This view allows the User to add the details about an Opportunity.

Fields

| Name | Type | Additional Information | Validation |
|----------------|----------|--|---|
| Opportunity* | Textarea | | |
| Potential* | Textbox | | Numeric with or without currency symbol |
| Probability* | Dropdown | Default options include: <ul style="list-style-type: none"> • 10% • 20% • 30% • 40% • 50% • 60% • 70% • 80% • 90% | |
| Expected close | Date | | |
| Stage* | Dropdown | Default options as configured in Account setup | |
| People* | Textbox | Display below the fold as additional options Include Contact by default | |

| | | | |
|------|---------|--|--|
| | | Use live search pattern to select Contacts as the User types | |
| Tags | Textbox | Display below the fold as additional options Use live search pattern to select Tags as the User types | |

Actions or Controls

| Name | Type | Additional Information | Validation |
|------------------|--------|------------------------|-------------------------------|
| Save Opportunity | Button | | Validate fields Close view |
| Cancel | Button | | |

Navigation Options

Not applicable

Exceptions

None

Notes and Issues

None

Add Relationship

Functional Description

This view allows the User to associate Contacts with each other and define their relationship.

Fields

| Name | Type | Additional Information | Validation |
|---------------|----------|---|------------|
| Contact* | Textbox | Use live search pattern to select Contacts as the User types | |
| Relationship* | Dropdown | Default options include in this order: 1. Account Executive 2. Spouse 3. Agent | |