Opportunities Module

Table of Contents

1. [View List of Opportunities 2](#_Toc388951254)
2. [View Opportunity 3](#_Toc388951255)
3. [Add or Edit Opportunity 5](#_Toc388951256)
4. [Add Action 7](#_Toc388951257)
5. [Add Note 7](#_Toc388951258)
6. [Add Tag 7](#_Toc388951259)

# View List of Opportunities

**Functional Description**

This view displays one or more Opportunities in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Opportunity | Link |  |  |
| People | Text | If Opportunity Module is set to People, then label as ‘People’  If Opportunity Module is set to Companies, then label as ‘Company’ |  |
| Potential | Text | Format as currency without decimals |  |
| Stage | Text | Allow Users to change Stage within the table by selecting a new value from a dropdown |  |
| Expected Close | Text |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon | Associated with a record |  |
| Delete | Icon | Associated with a record | Alert: “You’re about to delete 1 Opportunity and its history. Are you sure you want to delete 1 Opportunity?”  Buttons: “Delete Contact” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Opportunity | Link |  |
| Edit Opportunity | Link |  |
| Delete Opportunity | Link |  |
| Add Tag | Link | If one or more records are selected |

**Exceptions**

None

**Notes and Issues**

None

# View Opportunity

**Functional Description**

View Opportunity allows the User to view an existing Opportunity information including: opportunity info; actions; notes; a history of actions and updates; associated files; and custom tabs/fields (if any).

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Opportunity Name | Text |  |  |
| Contact Name(s) | Link | If Opportunity Module is set to People, then display Contact Name(s)  If Opportunity Module is set to Companies, then display Company Name  Link to record |  |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| Opportunity Description | Text |  |  |
| People Involved | Link / Text | Display Contact Names and Roles  Display as: [Contact Name], [Role] |  |
| Potential | Text | Display as currency without decimals  Display as: [Potential] potential |  |
| Stage | Text | Display as: In [Stage] stage |  |
| Expected Closing Date | Text | Display as: Expected to close [Expected Close Date] |  |
| Owner | Text | Display as: Owned by [Owner] |  |
| **Actions (Right Sidebar)** | | | |
| Action | Text | Display 3-5 Actions (the number depends upon available space and/or what works well to balance the UI) |  |
| Reminder | Text | Display if reminder date if set |  |
| **Timeline (Tab)** | | | |
| **Attachments (Tab)** | | | |
| **[Custom Tab] (Tab)** | | | |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit Opportunity | Icon |  |  |
| Add Action | Icon | Associated with Actions in the sidebar |  |
| Action Status | Checkbox | User selects checkbox to identify the action as complete |  |
| Edit Action | Icon | Associated with the action in the sidebar |  |
| Delete Action | Icon | Associated with the action in the sidebar | Alert: “You’re about to delete this action. Are you sure you want to delete?”  Buttons: “Delete Action” and “Cancel” |
| Next Action | Icon | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |
| Previous Action | Icon | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Edit Opportunity | Link |  |
| Add Action | Link |  |
| Add Note | Link |  |
| Delete Opportunity | Link |  |
| Back to list | Link | If Opportunity was selected from a list, then provide option to go back to the list |
| Backwards | Icon | If Opportunity is part of a list, then provide option to view the previous Contact |
| Forwards | Icon | If Opportunity is part of a list, then provide option to view the next Contact |

**Exceptions**

None

**Notes and Issues**

None

# Add or Edit Opportunity

**Functional Description**

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

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Opportunity\* | Textbox |  | Check for duplicate Opportunity Name |
| Buyer(s)\* | Textbox | If Opportunity Module is set to People, then display ‘Buyer(s)’  Live search field of existing People Contacts | One or more People allowed as Buyers |
| Company\* | Textbox | If Opportunity Module is set to Companies, then display ‘Company’  Live search field of existing Company Contacts | Only one Company allowed |
| Potential\* | Textbox | Format as currency without decimals | Numeric with or without currency symbol |
| Stage\* | Dropdown | Default options as configured in Account setup |  |
| Expected Close\* | Date |  | Today’s date or later |
| Contact | Textbox | Live search field of existing People Contacts |  |
| Role | Dropdown | Default options include in this order:   1. Agent 2. Lawyer 3. Decision-maker |  |
| People Involved | Text & Link | Display as: [Contact Name], [Role]  Link Contact Name to record |  |
| Description | Textarea |  |  |
| Owner\* | Textbox | Live search of all Users  Prepopulate with current User |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add People Involved | Link | When selected, display options to select a Contact, identify a Role, and Add Contact to the Opportunity |  |
| Add Contact | Button | Adds Contact and Role to ‘People Involved’ section | Requires Contact and Role |
| Delete Contact | Icon | Associated with Contact in People Involved section |  |
| Save Opportunity | Button |  | Perform validation  Display View Opportunity after saving |
| Cancel | Button |  | Return to previous view |
|  |  |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Opportunity | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Add Action

**Functional Description**

This view allows the User to record an action.

This view is the same as ‘Add Action’ for the Contacts Module.

# Add Note

**Functional Description**

This view allows the User to record a note.

This view is the same as ‘Add Note’ for the Contacts Module.

# Add Tag

**Functional Description**

This view allows the User to add one or more tags to a list of Opportunities.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add tag(s)\* | Textbox | Use live search pattern to select Tag as the User types |  |
| [Popular Tags] | Checkbox | If ‘Popular’ link is selected, which it is by default  List of top-ten most popular tags |  |
| [Recent Tags] | Checkbox | If ‘Recent’ link is selected, which it is by default  List of ten most recently-used tags |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add Tag | Button | Disabled by default  Enable when tag is entered or selected |  |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

Sample UI

