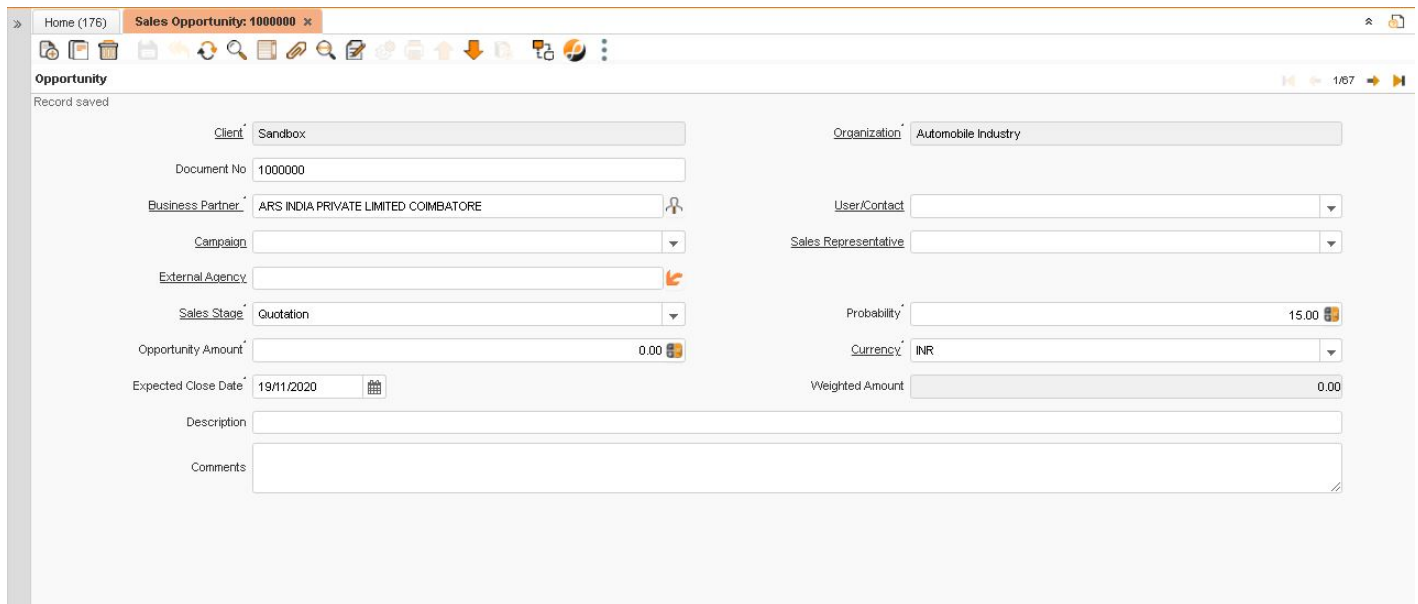


Tabs

- Sales Opportunity Header
- Activity
- Custom Field
- Quote / order

Sales Opportunity Header



The screenshot shows a web-based form for a Sales Opportunity. The browser tab is titled 'Sales Opportunity: 1000000'. The form is titled 'Opportunity' and has a 'Record saved' status. It contains various fields for client information, document details, and sales metrics.

Field	Value
Client	Sandbox
Document No	1000000
Business Partner	ARS INDIA PRIVATE LIMITED COIMBATORE
Campaign	
External Agency	
Sales Stage	Quotation
Opportunity Amount	0.00
Expected Close Date	19/11/2020
Description	
Comments	
Organization	Automobile Industry
User/Contact	
Sales Representative	
Probability	15.00
Currency	INR
Weighted Amount	0.00

Critical Fields

1. Business partner: We can select existing/new customer here and this field used to maintain the customer
2. Sales stage: The user must select the current stage or status of the sales opportunity based on the conditions provided.

- 2.1. Active Discussion
- 2.2. Estimation
- 2.3. Interest
- 2.4. Lead
- 2.5. Order Received
- 2.6. Preferred
- 2.7. Proposal
- 2.8. Quotation
- 2.9. Rejected

2.10.Selected

3. Probability: Percentage Probability of getting this sales opportunity. It is a Numeric value.
 4. Opportunity amount: Amount or estimate after receiving these sales opportunities.
 5. Currency: a medium of exchange for goods and services.
 6. Expected close date: Date Till Sales opportunity will be in closure stage.
-

Critical & onetime setup fields

- 1.Organization: This Field is used to select the organization
-

Non-Critical Fields

1. User/Contact: This field updates automatically when Business partner selected or you need to create new user in master for particular business partner.
 2. Campaign: a plan to do a number of things in order to achieve a special aim for that Sales opportunity. it is a master data
 3. Sales Representative: This field is used for sales representative updating purposes, It will display from the employee master when the sales representative field is checked
 4. Description: Used to describe specifics about a Sales opportunity document or any other note, information, or data, for example.
 5. Comments: Used to describe specifics about a Sales opportunity document or any other note, information, or data, for example.
 - 6.External Agency: It is used to select the existing business partner name.
-

Zoom condition's

1. Quotation
2. Sales order

Customization

Activity

Opportunity > Activity

Inserted

Client: Konnect Demo Organization: *

Sales Opportunity: 1000024_0.0

Activity Type: [dropdown]

Description: [text area]

User/Contact: zuvansky Sales Representative: [dropdown]

Comments: [text area]

Start Date: 08/06/2020 12:25:06 PM End Date: [dropdown]

☐ Complete

Critical Fields

1. Sales opportunity : Sales opportunity document number details populate by the system

2. Activity Type

2.1 Email

2.2 Meeting

2.3 Phone call

2.4 Task

3. Description: Used to explain specifics about Activity as well as any other relevant comment, information, or data.

4. Start Date: Lead start date

5. End date: Lead end date

Critical & onetime setup fields

Non-Critical Fields

1. Sub Activity: It is a master data. use to create any activity with in main activity.
 2. User/Contact: This section is used to identify the user or contact who is involved in or accountable for the activity or you need to create new user in master as per business partner.
 3. Sales Representative: This field used for sales representative updating purpose ,the regard will display from employee master when sales representative field is checked
 4. Comments: Used to describe specifics about a Activity document or any other note, information, or data, for example.
 - 5.Complete check box: Check this box to indicate that the activity is finished.
-

Zoom condition's

Customization

Custom Field

Home (70) Summary Generate Vendor RMA x Sales Rep Dashboard: Mukund... x Mobile Marketing Campaign: ... x *Interest Area x *Sales Opportunity: 1000000 x

Opportunity > Custom Field

Inserted

Client * Konnect Demo Organization * *

Sequence 10 Sales Opportunity * 1000000_0

Custom Columns * Value Column

Critical Fields

1. Sequence: Method of ordering records (lowest number comes first)
2. Custom columns: Additional field used for reporting purposes.

Critical & one-time setup fields

Non-Critical Fields

1. Value Column: To note Values of column Manually.

Quote / order

[Opportunity](#) > [Quote/Order](#) > Order Line 1/1

Client	Konnect Demo	Organization	Manufacturing Discrete
Order	20000_06/12/2018		
Business Partner	Name 1	Partner Location	Coimbatore
Line No	1		
Warehouse	Manufacturing Discrete Store		
Product	1000014_Bolt 23X25	Charge	
Attribute Set Instance		Resource Assignment	
Description			

Quantities

Quantity	10	UOM	Each
Ordered Quantity	10	Delivered Quantity	0
Reserved Quantity	0	Quantity Invoiced	0

Amounts

Price	50.00	Unit Price	50.00
List Price	50.00		
Tax	No Tax	Discount %	0.0

Reference

Project	
Campaign	

Status

Line Amount	500.00	Lost Sales Qty	0
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Note: This window update automatically when opportunity against Quotation create