

Sales Opportunity Header

The screenshot shows a web application interface for a Sales Opportunity. The browser tab is titled 'Sales Opportunity: 1000000'. The page has a top navigation bar with 'Home (176)' and a search icon. Below the navigation bar, there's a toolbar with various icons for document management. The main content area is titled 'Opportunity' and shows a 'Record saved' message. The form is divided into two columns. The left column contains fields for 'Client' (Sandbox), 'Document No' (1000000), 'Business Partner' (ARS INDIA PRIVATE LIMITED COIMBATORE), 'Campaign' (dropdown), 'External Agency' (text field with a right arrow icon), 'Sales Stage' (Quotation), 'Opportunity Amount' (0.00), 'Expected Close Date' (19/11/2020), 'Description' (text area), and 'Comments' (text area). The right column contains fields for 'Organization' (Automobile Industry), 'User/Contact' (dropdown), 'Sales Representative' (dropdown), 'Probability' (15.00), 'Currency' (INR), and 'Weighted Amount' (0.00).

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.
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Critical & onetime setup fields

1. Organization: This Field is used to select the organization
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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.
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Zoom condition's

1. Quotation
2. Sales order

Customization

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