

Sales Opportunity Header

The screenshot shows a web browser window with a single tab titled "Sales Opportunity: 1000000". The browser's address bar and toolbar are visible. The page content is a form titled "Opportunity" with a "Record saved" message. The form is organized into two columns of fields. The left column includes: Client (Sandbox), Document No (1000000), Business Partner (ARS INDIA PRIVATE LIMITED COIMBATORE), Campaign (dropdown), External Agency (dropdown), Sales Stage (Quotation), Opportunity Amount (0.00), Expected Close Date (19/11/2020), Description, and Comments. The right column includes: Organization (Automobile Industry), User/Contact (dropdown), Sales Representative (dropdown), Probability (15.00), Currency (INR), and Weighted Amount (0.00). The form fields are mostly text inputs or dropdown menus, with some numerical and date fields.

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

Revision #8

Created Mon, Jun 8, 2020 5:38 PM by [Vijayakumar S](#)

Updated Tue, Nov 14, 2023 12:31 PM by [Logesh D](#)