Opportunities Table

This table tracks sales opportunity information and contract information when an opportunity becomes a sale.

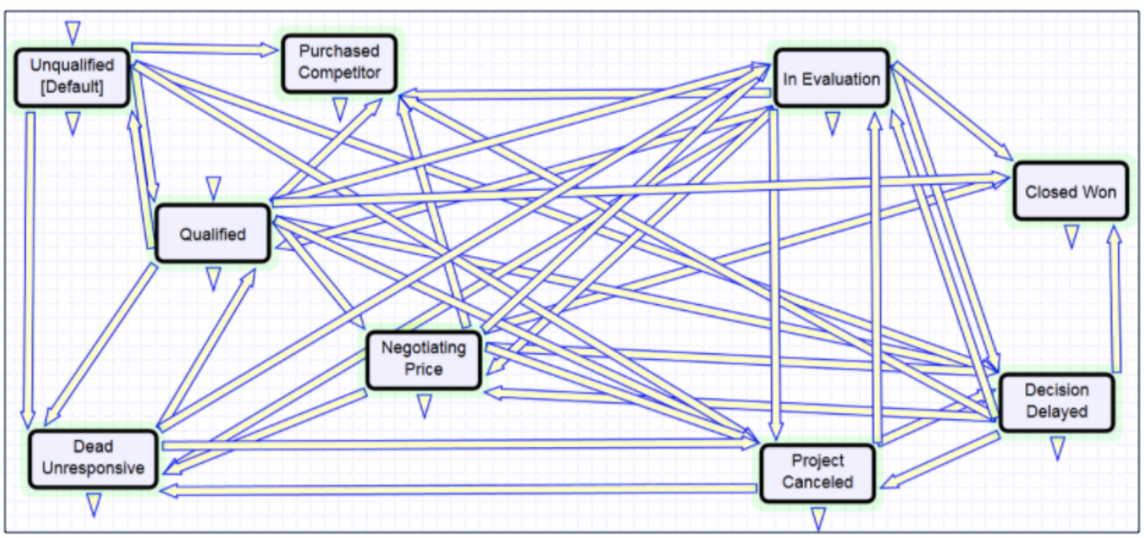
Use Case

Most Opportunity records are created from Leads via a Conversion rule. Members of the Admin, Marketing or Sales groups may create records manually. Opportunity records track possible sales. On the Deal Info tab, sales staff can rate the opportunity, estimate the value and probability of the sale, and indicate the prospect's Key Requirements and Positive Factors in the appropriate fields.

The Related Records tab shows other people linked to the Opportunity, as well as Quotes or Contracts that are linked to the current record.

Admins and members of the Sales, Business Admin, and Marketing groups can create, view and edit Opportunities. Members of the Project Manager and Service Manager groups may view all Opportunities. No other groups have access to the table by default.

Workflow



Ownership

Records in this table are owned by the individual assigned sales rep, so each record is associated with a particular user login from the Contacts table.