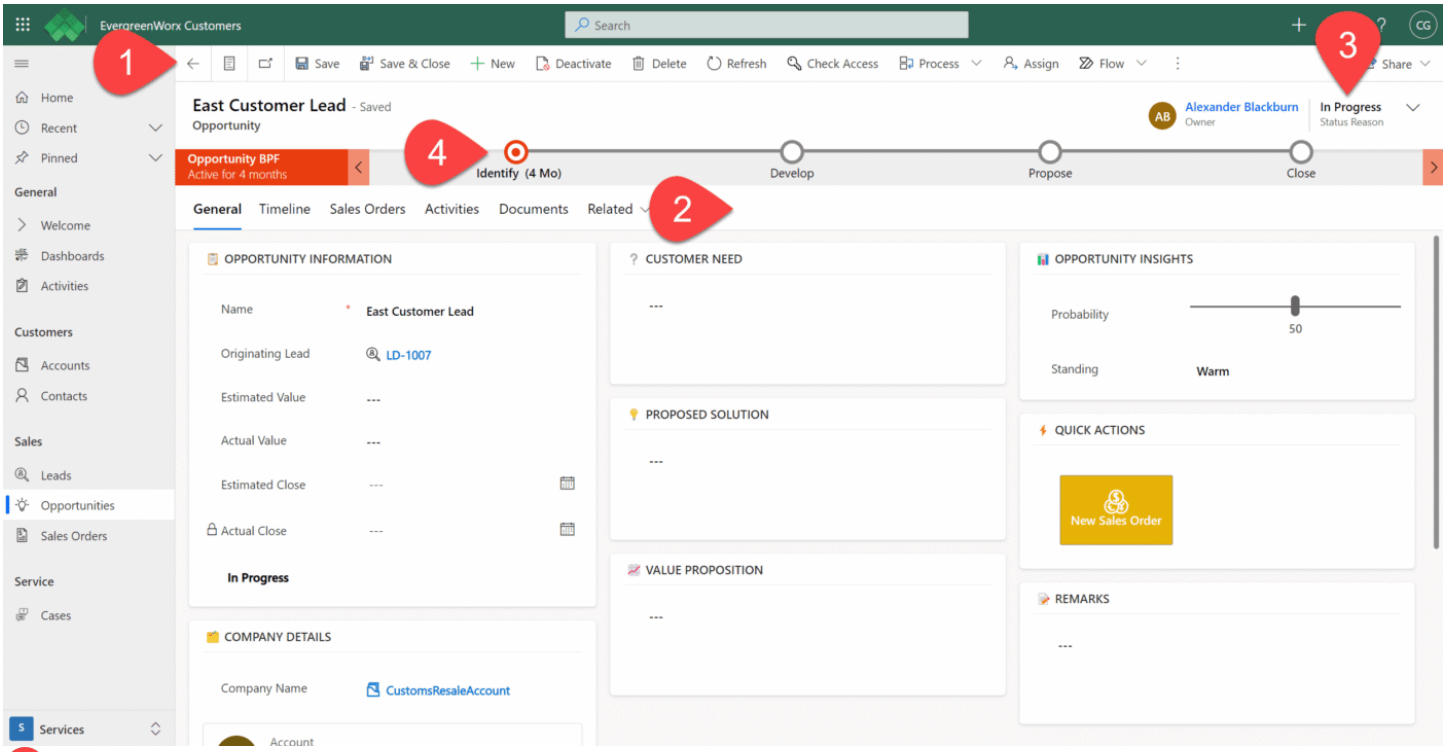
Opportunities

Customers · https://evergreenworx.com/docs/opportunities/

The Opportunity record form stores key information about a potential sales opportunity for an existing customer or a potential new customer.



1 In the ribbon, available actions are displayed for the current Opportunity record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Opportunity record, you'll see the following tabs:

- Summary – Displays identifying information about the customer and contact person, as well as details such as estimated value, potential close date, sales probability, and potential solution to the customer's need. A quick action button is provided for creating a Sales Order from the Opportunity.

- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.
- Sales Orders – Displays a list of sales orders generated from the Opportunity. For more information, see Sales Orders | EvergreenWorx.
- Activities – Provides the capability of capturing and tracking communications related to the management of the Opportunity. For more information, see Activities | EvergreenWorx.
- Related – Other related items, such as Record Audit History.

3 Status of the opportunity record shows whether this is New, In Progress, On Hold, and Won or Lost (indicating whether it did or did not turn into a Sales order).

4 Business Process Flow of the record shows the specific stages of an Opportunity's processing. These include Identify, Develop, Propose and Close.