

Pipelines - Hyperlink Added to Sales Opportunities if Contact Exists (15784) [Enhancement]

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The Pipeline Opportunities Dashboard now includes a new "Contact" column. If a contact is identified on the proposal, the contact's name will display as a hyperlink in the Contact column. When selected, the 'View Contact' screen displays with the contact's information.

The screenshot shows the Pipeline Opportunities Dashboard with a 'View Contact' modal open. The main dashboard includes filters for 'DIVISION' (All) and 'SALES REP' (Dave Pike, House Account (Sales), House Acct non S). It features an 'Estimated Close' table and a 'Closing Probability' table. The 'View Contact' modal displays the following information:

VIEW CONTACT	
Details Account Portal Access Tags Activity History	
TITLE	<input type="text"/>
NAME	GLORIA
EMAIL	<input type="text"/>
EMAIL 2	<input type="text"/>
PHONE 1	<input type="text"/> (999) 999-9999
PHONE 2	<input type="text"/> (999) 999-9999
PHONE 3	<input type="text"/> (999) 999-9999
PHONE 4	<input type="text"/> (999) 999-9999
NOTE	<input type="text"/>

The main dashboard table below the modal is as follows:

PROPOSAL ID	SITE NAME	CONTACT	NEXT STEP	STATUS	SALES REP
3825	John Doe			Open	House Acct no
3828	S. BAPTIST CHURCH	GLORIA		Open	House Acct no
3830	Navu CO. AIR NAIL BUILDERS			Open	House Accour
3834	CROSSROADS COMMUNITY CHURCH			Open	House Acct no

Pathway: Sales > Pipelines > Opportunities > Make a selection from the upper grid