

Sales (Pipelines) - Improvements Applied To Pipeline Opportunities (15946) [Enhancement]

Last Modified on 11/30/2023 3:27 pm EST

The following changes have been made to the Pipeline Opportunities screen:

1. The previously displayed checkbox filters have been moved to the top of the screen and are now presented as dropdown selections. The default setting for each is 'All.'
2. Division Groups have been added to display in the Division drop down options.
3. A 'Group By' drop down has been added to group opportunities by either Month or Quarter. Depending on the chosen option, the associated 'Estimated Close' months checkboxes below the dropdown will automatically change to align with the selection.
4. The Estimated Close months and Closing Probability check boxes have been updated.
5. The Proposal ID now includes a hyperlink to display the Edit Proposal popup editor.
6. Columns for Proposal Properties and Account Properties have been added.
7. The following proposal fields can now be edited from the Sales Opportunities screen by clicking within the field:
 - o Sales Rep
 - o Estimated Closing Date
 - o Start Date
 - o Probability
 - o Double click within the row of a proposal to open the Edit Proposal window.

The screenshot displays the 'SALES OPPORTUNITIES' interface. At the top, there are filter dropdowns for Division (CORPUS, DAYTON), Sales Rep (Aliena Somers), Account Class (BROKER, COMMER), Status (Open, Submitt), Form Type (Proposal, Servi), and Temporary / Permanent (Permanent, Temporary). A 'LIMIT TO PROSPECTS' checkbox and a refresh icon are also present. Below the filters is a summary table with columns for 'Estimated Close' (GROUP BY: Month) and 'Closing Probability' (High, Medium, Low). The summary table shows data for Prior Months, 2023-NOV, 2023-DEC, 2024-JAN, and 2024-FEB + Future. At the bottom is a table of proposals with columns: PROPOSAL ID, SITE NAME, CONTACT, NEXT STEP, STATUS, SALES REP, MONT... REV., ESTIMATED CLOSING DATE, START DATE, PROBA..., FORMAT, FORM TYPE, PROPOSAL PROPERTIES, and ACCOUNT PROPERTIES. A search bar is located above the proposal table. Red callout numbers 1 through 7 highlight specific UI elements: 1 (Form Type dropdown), 2 (Division dropdown), 3 (Group By dropdown), 4 (Estimated Close checkboxes), 5 (Proposal ID link), 6 (Proposal Properties icon), and 7 (Sales Rep field in proposal row).

Pathway: Sales > Pipelines > Opportunities

