

vTiger Opportunity Creation for Pipeline 8/15/12

○ Probability %

- 25% = Customer has requested a call at later date or an email with follow up
- 50% = Completed call on specific project/product with follow up call required
- 75% = Quote delivered with meeting set to review
- 90% = Verbal or written acceptance of quote for current month of pipeline

*NOTE:

Probability % is a text field and will need to be typed in accurately following the four (4) % guidelines above. The field will only allow a number to be entered, you will not need to enter a (%) or you will get an error message.

Creating New Opportunity

Basic Information

Save Cancel

Opportunity Information:

*Opportunity Name	Lisa's Test Company.com - Storefront Design	Opportunity No	AUTO GEN ON SAVE
*Related To Organizations	Lisa's Test Company	Amount: (\$)	999.00
*Assigned To	User Lisa Kramer	Sales Stage	Prospecting
Next Step	Callback Scheduled Fri, 8/17/12	Probability (%)	90
Targeted Close Date	08-22-2012	Sales Should Contact Client By Date	08-17-2012