

The “Value / Period” field: Detail Applet for totaling Opportunity Values by Month, Quarter and Year.

The “Value / Period” field provides a displayable applet for systems administrators and sales managers to display and edit the total of opportunities by period and total of combined value of the opportunities within the detail page of Contacts and/or Organizations.

Opportunities are commonly used with the on-line application to track sales transactions by Contact or Organization. Only Opportunities that are set with a Status = Forecasted will be included in the applet.

Follow these steps to setup the “Value / Period” applet:

Create a “Value / Period” custom defined field:

Go to Account > Setup > Custom Field > Contact or Organization and add a new custom field with a name you choose.

1) Reminder & Alert: Appointment Reminder: Personal appointment

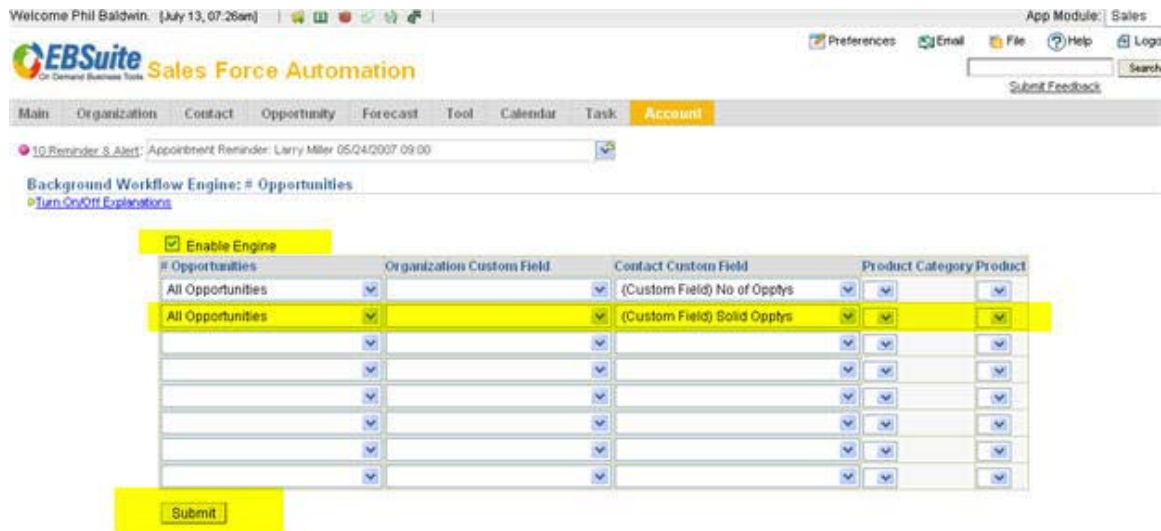
Setup Custom Fields: Contact

Turn On/Off Explanations

Name	Description	Display Order	Type	List Of Values	Inactive
Budget	Budget	1	Character String	Edit	<input type="checkbox"/>
Timing	Timing in Months	2	Number		<input type="checkbox"/>
Area	Area of Town	3	Character String / Option	Edit	<input type="checkbox"/>
Dollars Down	Dollars Down	4	Number		<input type="checkbox"/>
Maint	Urgency - How often to contact in days	5	Character String	Edit	<input type="checkbox"/>
Property Address	Property Address	37	Character String	Edit	<input type="checkbox"/>
Team Agent	Team Agent	39	Character String	Edit	<input type="checkbox"/>
Client Status	Client Status	40	Character String / Option	Edit	<input type="checkbox"/>
SOI Groups		41	Character String	Edit	<input type="checkbox"/>
Past Client Groups		42	Character String	Edit	<input type="checkbox"/>
Source	Source	43	Character String	Edit	<input type="checkbox"/>
Do Not Call Ph1	On Do NOT Call List	44	Character String / Option	Edit	<input type="checkbox"/>
Merge Code		45	Character String	Edit	<input type="checkbox"/>
No of Opplys	No of Opplys	46	Number		<input type="checkbox"/>
Commission Calc		47	Number/Calculated	Edit	<input type="checkbox"/>
Number		48	Number/Calculated	Edit	<input type="checkbox"/>
Financial doc		49	File / Link		<input type="checkbox"/>
Last Date		50	Date		<input type="checkbox"/>
Color		51	Color Code	Edit	<input type="checkbox"/>
String		52	String/Calculated	Edit	<input type="checkbox"/>
Solid Opplys	Opportunities over 80 percent	53	Value / Period		<input type="checkbox"/>
		54	Character String		<input type="checkbox"/>

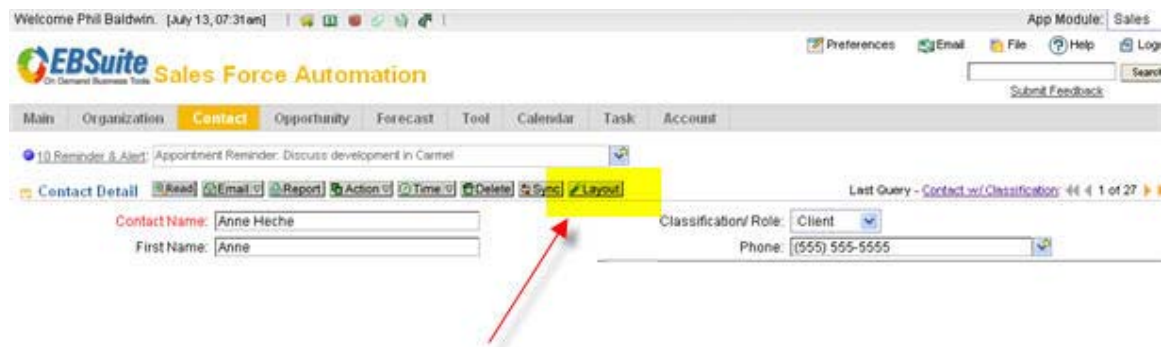
Set the custom field type to: “Value / Period”

Go to Account > Setup > Background Workflow Engine > # Opportunities
 Add the field you just created and a View (in the # Opportunities column) then Enable the Engine and Submit.



Place the newly created Custom Field (in this example called “Solid Oppty”) in the detail window of choice.

From the Detail display go to Layout



Place the custom field where ever you choose.

EBSuite Sales Force Automation

Preferences Email File Help Logout

Main Organization Contact Opportunity Forecast Tool Calendar Task Account

10 Reminders & Alerts: Appointment Reminder: Discuss development in Carmel

Page Layout Editor: Contact Fields / Detail (Edit Mode) - Main Section

Setup For: Company-Wide Setup

2 Column Mode

Column 1	Column 2
Field: Display Name Label: Contact Name (Optional) Color: Red	Field: Classification Label: Classification/ Role (Optional) Color:
Field: *First Name Label: First Name (Optional) Color:	Field: Phone (Popup) Label: Phone (Optional) Color:
Field: *Last Name Label: Last Name (Optional) Color:	Field: Closing info Label: Closing info (Optional) Color:
Field: (Custom Field)Client Status Label: Client Status (Optional) Color:	Field: Email (Popup) Label: Email address (Optional) Color:
Field: (Custom Field)Source Label: Source (who & how) (Optional) Color:	Field: (Custom Field)No of Opplys Label: No of Opplys (Optional) Color:
Field: Import Session Label: Import ID (Optional) Color:	Field: Birthday Label: Birthday (Optional) Color:
Field: (Custom Field)Financial doc Label: Financial Statement (Optional) Color:	Field: (Custom Field)Merge Code Label: Merge Code (Optional) Color:
Field: (Custom Field)Last Date Label: Date (Optional) Color:	Field: (Custom Field)Solid Opplys Label: Solid Opplys (Optional) Color:
Field: Label: (Optional) Color:	Field: Label: (Optional) Color:

Submit changes and see the applet.

Welcome Phil Baldwin: [July 13, 07:35am]

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Main Organization **Contact** Opportunity Forecast Tool Calendar Task Account

10 Reminders & Alerts: Appointment Reminder: Tee Time at Saw Grass

Contact Detail

Contact Name: Anne Heche
 First Name: Anne
 Last Name: Heche
 Client Status: 02b-Waiting to Qualify
 Source (who & how): Friend
 Import ID:
 Financial Statement:
 Date:

Classification/ Role: Client
 Phone: (555) 555-5555

Notes

Email address: Anne@applicationspecific.com
 No of Opplys: 4
 Birthday: (MM/DD/YYYY)
 Merge Code: dx

Solid Opplys	Edit
JUL - 2007 2 20690.00	
AUG - 2007 1 124000.00	
Q1 - 2006 1 9000.00	
Q3 - 2007 3 144690.00	
Year - 2006 1 9000.00	
Year - 2007 3 144690.00	

Update

Contact Details | Addresses | Linked Contacts / Organizations | Team

History Notepad

The applet results are for display. No print reporting is available other than reports around the Opportunity Report area that already exists.