

Opportunity Object


Managing and Cloning Views

We have previously seen how to maintain row colors in a view. Our view for Opportunities currently looks like this:

Action	Opportunity	Priority	Due Date	Customer	Requested By	Project Manager	Date Entered	Workflow Status
<input type="checkbox"/> Edit Del	Progress Pacific	🔴	04/02/2014	Progress Software	Dave Johnson	Craig Ellis	04/01/2014 09:33 AM	Assigned
<input type="checkbox"/> Edit Del	Low Priority Job	🟢	04/25/2014	Demo Company	wilma		04/01/2014 10:58 AM	Created
<input type="checkbox"/> Edit Del	Another Mid-Term Job	🔴	04/04/2014	Progress Software	Bob Z.		04/01/2014 09:49 AM	Created
<input type="checkbox"/> Edit Del	Mid range job		04/04/2014		Craig		04/01/2014 09:46 AM	Created
<input type="checkbox"/> Edit Del	Long Term Job		04/15/2014	Demo Company	Fred Flintstone		04/01/2014 09:35 AM	Created

By default, this represents All Opportunities. You will see that we added both the Project Manager and the Workflow Status columns. (Technically, we could get by with just the Project Manager field, because once that field is assigned, the status becomes assigned.)

Cloning a View

Our goal with this exercise is to create an alternate view tied solely to the current user (Project Manager). Rollbase gives you the ability to clone views for use as a starting point. To do this, click on the  button and click the “Clone this View” menu item.

Name the new view “My Opportunities” and remove the Project Manager column from the selected columns.

View Name

Provide a name for this view.

View Name

Hide this View from View Selector

Hide count of total records for this View

Private (Private Views are only available to their creator)

Selected Columns

- Opportunity
- Priority [visual_status]
- Due Date
- Customer
- Requested By
- Date Entered
- Workflow Status

It would be useful to have a count of the items in the list, so update the Totals and Subtotals section to count the opportunities.

Totals and Subtotals

Select numeric fields to page total, subtotal (by groups - if selected), grand total (for all pages) this view by. Select any other field to count number of records. Important limitation: grand total cannot include formula fields.

Total By

And By

And By

Hide group subtotals for this view.

Hide page totals for this view.

Hide grand totals (on all pages) for this view.