Opportunity Object

Creating and populating the Opportunity Object

The Opportunity object represents the contents of the current Bidding Board. They are basically proposals that need to be assigned to a Project Manager. This is the entry point to the entire organization. 75% come from email, 25% phone.

Opportunities should be the default grid view seen by Project Managers. The grid should support row coloring, with white being the default row color, with yellow appearing if the opportunity is due in 3 or less days, and red if the opportunity is due within 1 day.

A trigger should be used to convert an opportunity to (using a button interface) to create the proposal record and copy the opportunity documents to the proposal documents. Documents should include any emails, site plans, drawings, etc. which are applicable to the project.

Once converted, the opportunity record, and corresponding document records, should be deleted. (Saves record count). Note: Records can be kept as well, and flagged as complete.

When creating this object, be sure to turn on the Task and Workflow attribute. We'll discuss each more in depth below.

By default, with an attribute of Task, you get a required field called Task Subject. As we have a text field entitled Job Name, we're going to rename the task subject to this name and not add a new field.

Opportunity

Integer id
Text name
DateTime dateOfContact
Date dueDate
Text status (New, Assigned)
Rich Text messageContent
Text location
Text jobName
Text neededBy
Text requestedBy
Text specialConcreteRequirements
Text Area notes

Attributes

Attribute Workflow
Attribute Task

Relationships

Relationship Customer
Relationship Opportunity Document
Relationship Customer Contact

Triggers

Trigger convertToProposal
Trigger changeStatus

Permissions

Permission should be available to all

Views

View new
View edit
View view

Reports

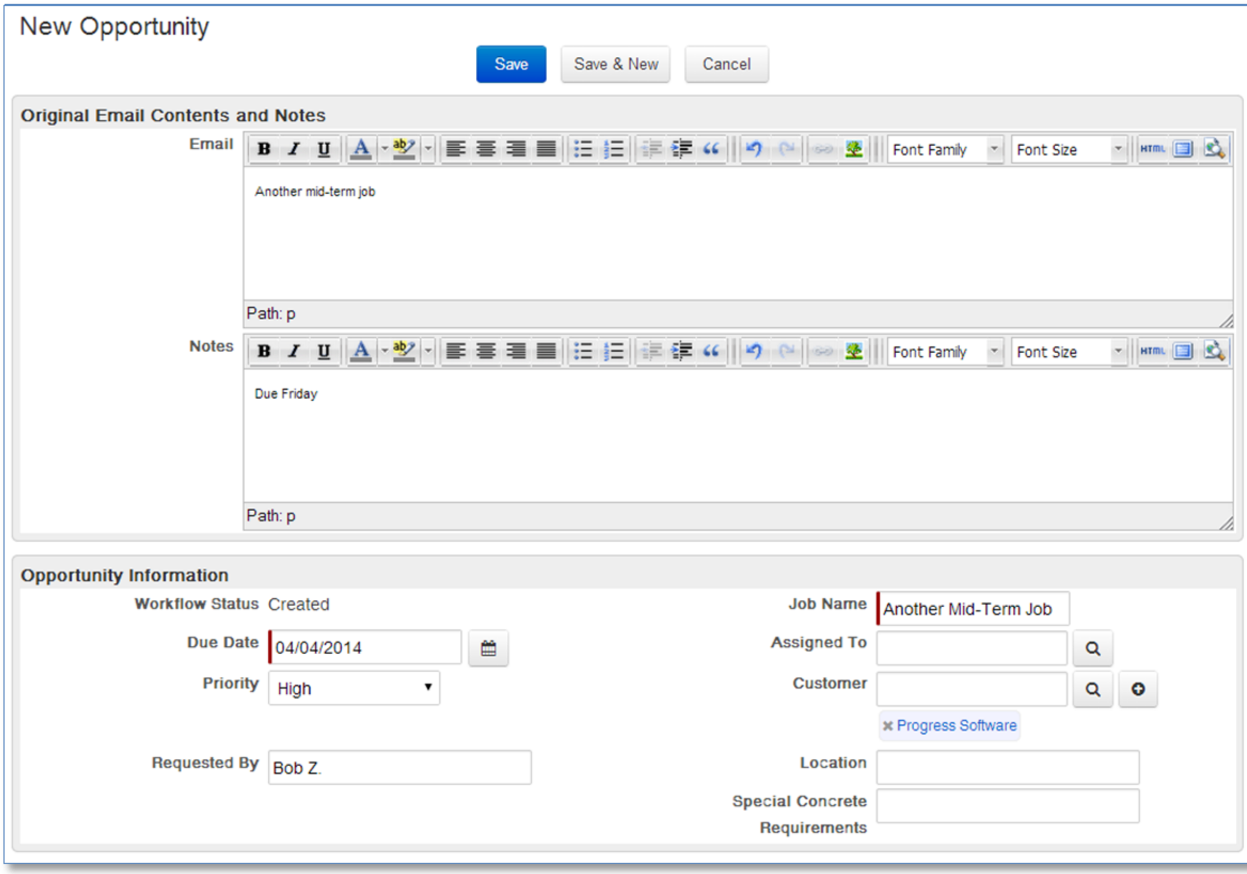
Report openOpportunities

Templates

Template statusEmailUpdate

Form Design

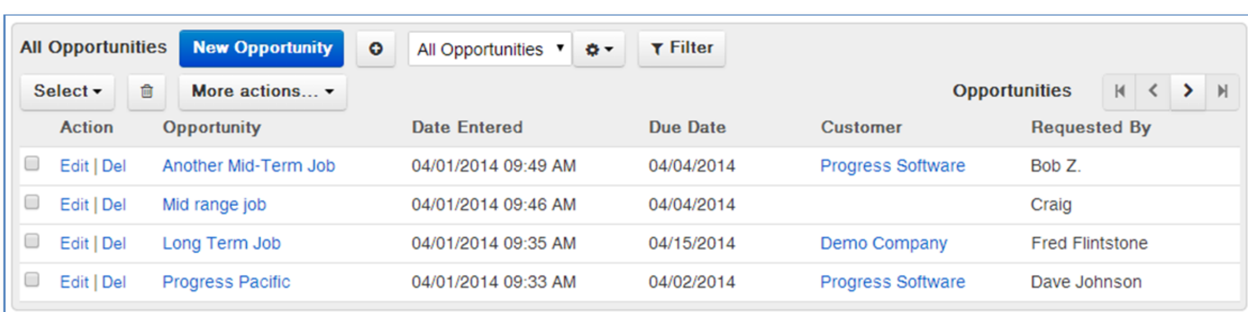
Review each of the three primary forms (New/Edit/View) and arrange them to taste. For now, I've only updated the New form, and mine looks like this:



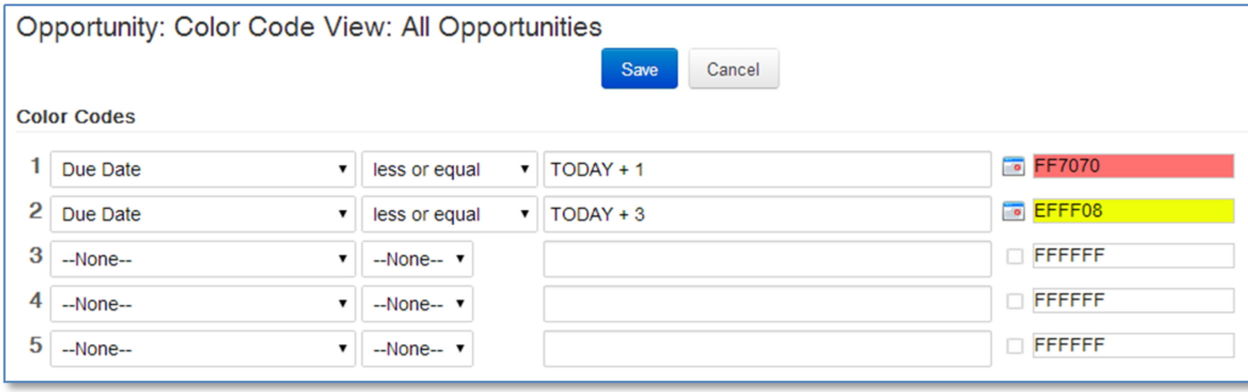
Go ahead and enter in several new opportunities. Per the design specification, we want any opportunity with a due date 4 days or longer to appear in white, 2-3 days in yellow, and due today in red. After you enter those records, we'll go ahead and discuss row colors.

Row Colors

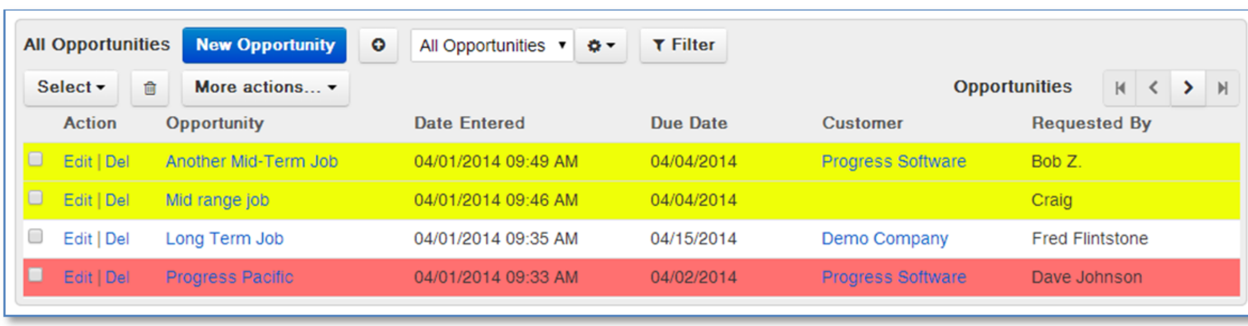
Now that we have several jobs on our list, and we've edited the columns of the default view, we are ready to discuss row colors. Currently my grid looks like this:



To adjust row colors, click on the button, and then the “Edit Row Colors” menu option.



As specified, we want our rows to be different colors, based on due dates. By default, the row color is FFFFFF (White). We do not need to make that a specification on this list, but we do need to flag the yellow and red rows. **IMPORTANT**: Shortest durations need to be at the top, because as you move down the list of 5 Color Codes, if the date criteria is met (say for a red record with a due date of tomorrow), it exits the logic, meaning it would not test TODAY + 3 for the yellow rows. Also note the use of the “TODAY” token. Rollbase recognizes this as the current system date. Also note, the “red” for urgent records is a softer red. If you use a full red (like in the word IMPORTANT above), the row is very hard to read. With these color settings, our grid now looks like this:



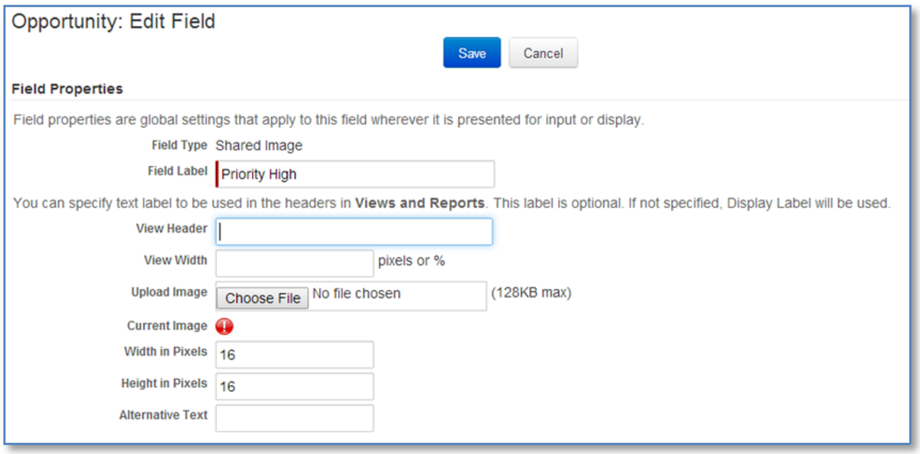
Creating an Icon to Reflect Priority

To add a little bit of flair to this view, it is desired to have some icons display based on the Priority of the opportunity. The opportunity object has three priorities (High, Normal and Low). If an opportunity is a high priority, we want to display a red icon, and if it’s a low priority, we want a green arrow icon. If the priority is Normal we won’t display an icon, as Normal is the default status and it is felt that if every record had an icon, it would be visually distracting. This is a two-step process. The first step is to create “Shared Image” fields to upload your chosen image. Secondly, we will create a formula field to determine the Priority and display the proper icon.

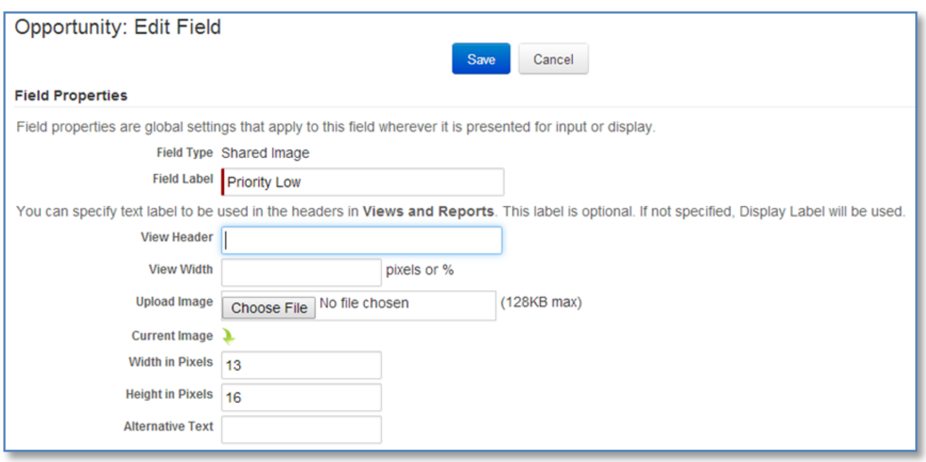
Shared Image Fields

We need two shared image fields; one for the high importance icon and one for the low importance icon. Try not to use JPG images, as the background of a shaped object will not look good. I have created two GIF files with transparent icons for this task.

Under the object definition page for Opportunity, create a new Shared Image field. Call this field "Priority High", click on the "Choose File" button and browse to where you saved your GIF file, and then specify a height and width of 16 pixels. Click "Save" when done.

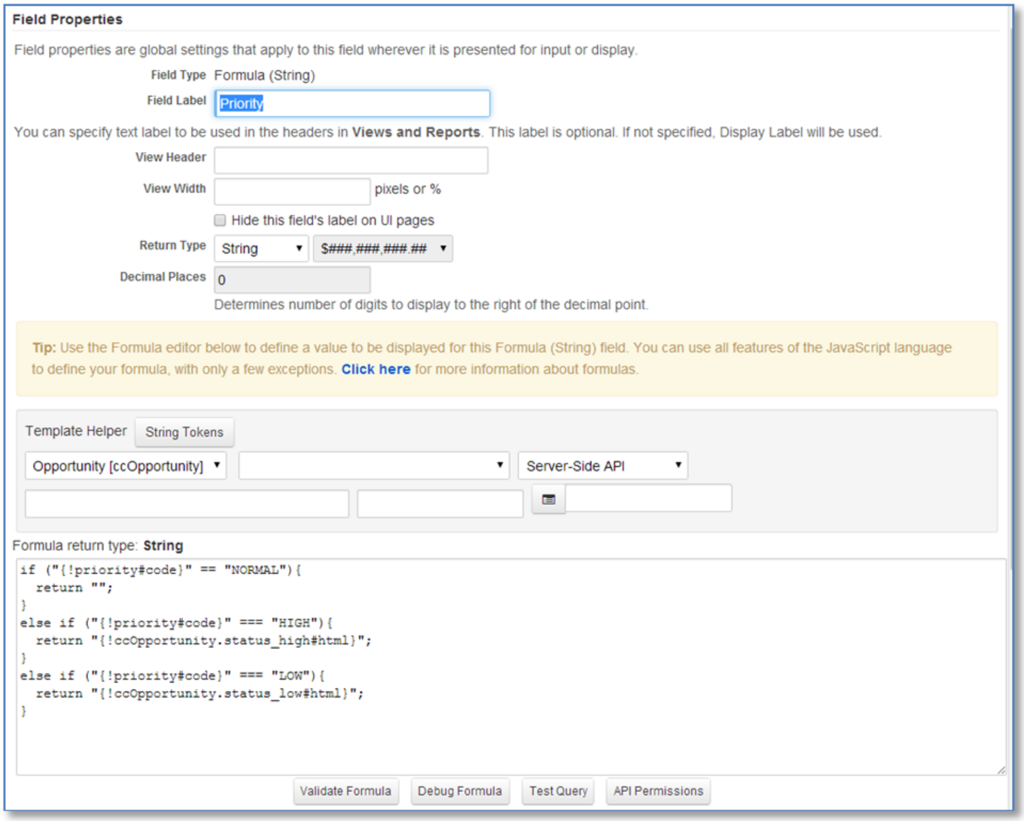


Create another Shared Image field. Call this field "Priority Low", click on the "Choose File" button and browse to where you saved your GIF file, and then specify a width of 13 pixels and a height of 16 pixels. (Note: This icon is not truly "square", and you are not forced to use the same pixel value) Click "Save" when done.



Formula Fields

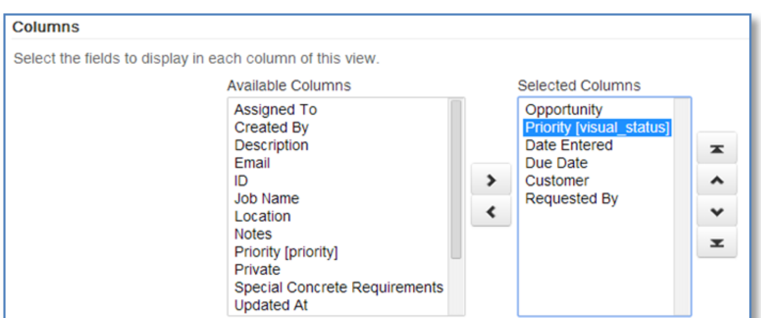
We need to now create a New Formula Field . Click this button (located to the normal blue New Field button). Give it a field label of "Priority", select a return type of "String" and enter the formula as shown below, including double quotes. It is testing the CODE property of our original Priority field. The valid codes are equal to the quoted strings "HIGH, NORMAL and LOW". The integration name for the two

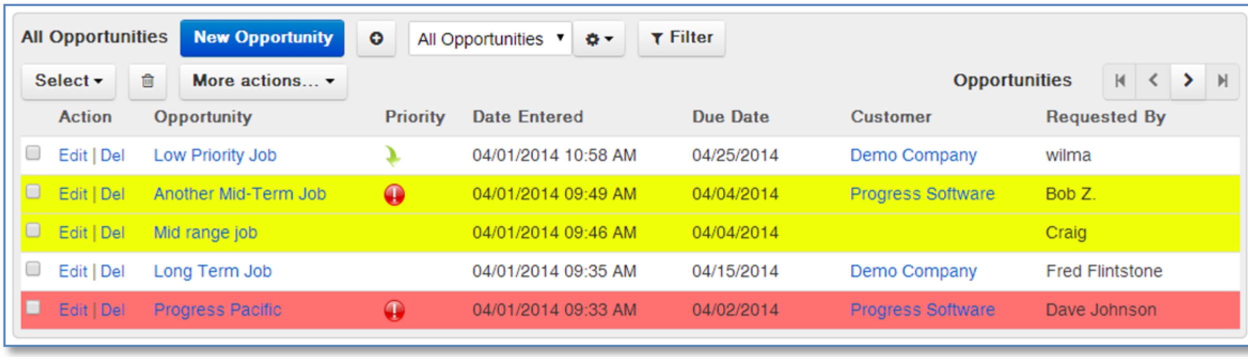


shared image fields (in my example) are "status_low" and "status_high". You will notice that the return items are surrounded in double quotes AND that we picked the "#html" token. The resulting string returned will be an HTML representation of the image. For the priority of NORMAL, an empty string is returned. After you have completed the formula, save your changes and return back to the opportunity grid.

Adding the Icon to the Grid

Locate the formula field you just created and add it to the selected columns. I decided to make that the second column. If all works correctly, you should now see your grid with icons, as shown on the next page.





All Opportunities | New Opportunity | All Opportunities | Filter

Select | More actions… | Opportunities

	Action	Opportunity	Priority	Date Entered	Due Date	Customer	Requested By
	Edit | Del	Low Priority Job		04/01/2014 10:58 AM	04/25/2014	Demo Company	wilma
	Edit | Del	Another Mid-Term Job		04/01/2014 09:49 AM	04/04/2014	Progress Software	Bob Z.
	Edit | Del	Mid range job		04/01/2014 09:46 AM	04/04/2014		Craig
	Edit | Del	Long Term Job		04/01/2014 09:35 AM	04/15/2014	Demo Company	Fred Flintstone
	Edit | Del	Progress Pacific		04/01/2014 09:33 AM	04/02/2014	Progress Software	Dave Johnson