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:

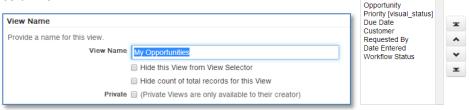


By default, this represents All Opportunities. You will see that we added both the Project Manager and the Workflow Status columns. (Technically, we could get by with just the Project Manager field, because once that field is assigned, the status becomes assigned.

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.



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.

