

Delete Opportunity

1. From **CRM** module, click **Opportunities**. Opportunity search screen will appear.
2. Select opportunity you want to delete then click Open toolbar button.

Opportunity - Delete Opportunity

New Save Search Undo Duplicate Delete Close

Details Overview Activities (0) Attachments (0) Audit Logs (1)

Direction Sale

Opportunity Name Delete_Opportunity

Executive Update This Opportunity will be deleted

Company Loc 0001 - Fort Wayne

Entity DEMO TEST

Entity Location Headquarters

Contact

Phone

Campaign

Lines of Business

Sales Pipe Status Prospecting

Source

RFP / RFI Link

Product

Version

Competitor

Current Solution

Referred By

Milestone

Created Date 6/15/2017

Close By Date

Go Live Date

Kickoff Dates

% Complete

Completed

Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Sales Person

Opportunity Status Open

Internal Project Manager

Initial Data Collection Complete

Customer Project Manager

Customer Leadership Sponsor

Customer Key Project Goals

Custom Modifications

Software Bill Date

Software Bill Date Comments

Hardware Order Date

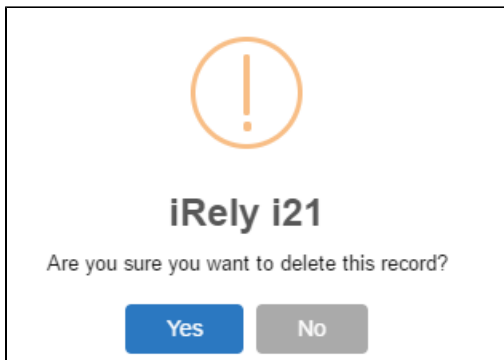
Hardware Bill Date Comments

Initial User Group Dues Invoice

Received Down Payment

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3. Click **Delete** toolbar button. This message box will appear:



4. Click No to cancel deletion. Click **Yes** to delete the opportunity.