

Pipeline Forecast

1. From **CRM** module, click **Opportunities**. All Opportunities search screen will appear. 3 tabs will be available (All Opportunities, Pipeline Forecast, Win/Loss Analysis)

All Opportunities

Close

All Opportunities

Pipeline Forecast

Win/Loss Analysis

Open Selected

New

Export

Columns

View

1

Created Date

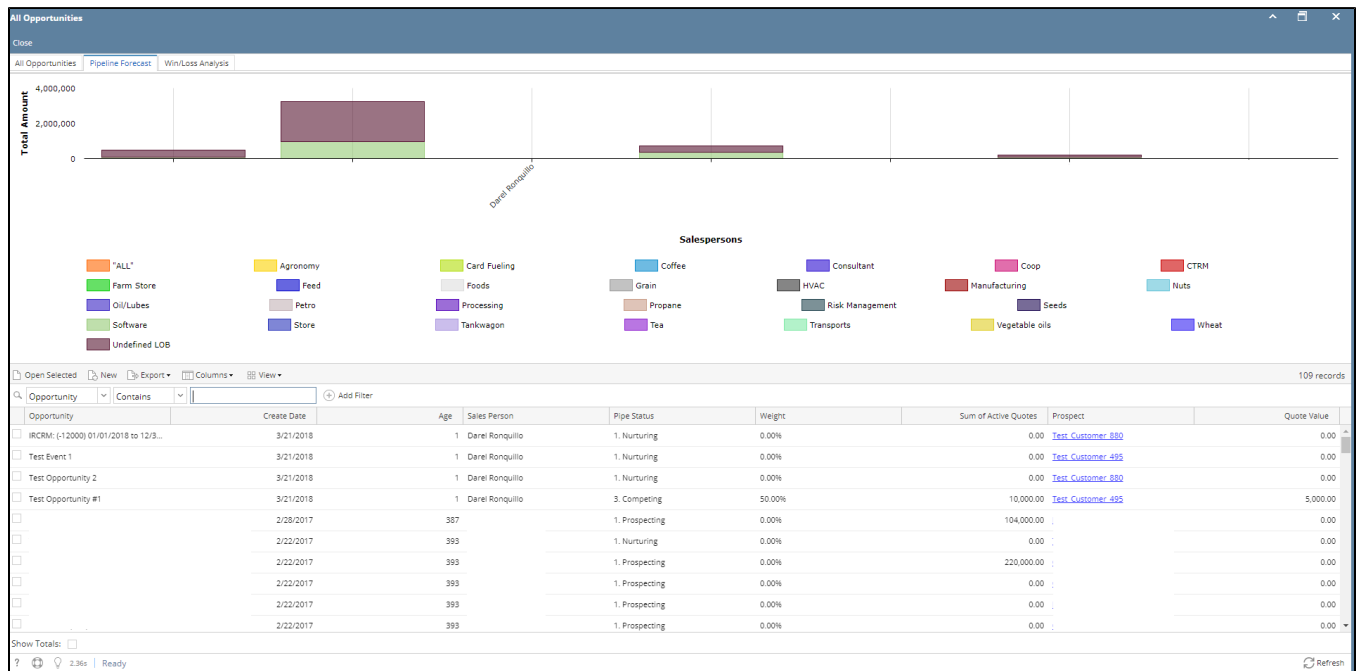
Between

and

Add Filter

Created Date	RFP/RFI Link	Attachment	Opportunity Name	Pipe Status	Competitor	Current System	Lines of Business	Close By Date	Source	Campaign	Description	Pipe Percentage	Software Amount	Maintenance Am	Other Amount	Opportunity Am	Net Opportunity A	Last Activity D	
03/21/2018	https://google.c...		1 Test Opportunity #1	3. Competing	Will not disclose	Will not disclose	Consultants		Prospecting			03/21/2018	50.00%	10,000.00	0.00	0.00	10,000.00	5,000.00	03/21/2018

2. Go to Pipeline Forecast tab:



3. User can remove the Line of Business in the graph (Total Amount x Salespersons), click the Line of Business legend to exclude it from the graph.

4. To open opportunity from Pipeline Forecast tab, select the opportunity then click Open Selected button.