Smart Views - Offers

Target audience: Home Portal's users

- Offers table
- Search Filter panel
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Module

Smart View - Offers

Offers are components of Opportunities. One opportunity may have multiple alternative offers of which only one can be selected you browse offers. You can check the statuses of particular offers, their probability of acceptance by the client and you can edit th

Offers table

You can view and manage the offers. Click anywhere in the row of the particular offer to see its details.

The example provided concerns the default view. Smart Views are very customizable, therefore the example might be slightly different than what you can see on your screen.

The default view columns provide the following information:

- Opportunity > Name: Name of the Opportunity, which the offer is a part of.
- Name: Name of the offer. Each offer that is a component of one Opportunity needs to have different name and different details.
- Status: Status of the Offer. Here you can see for example whether the Offer was accepted or refused.
- Probability: You can see in this column the percent value which represents probability of creating a project.

Checkbox column	You can select the checkbox in the hea... page. Click the arrow icon next to the ... the selection actions menu you can de... • Select All on This Page: Every enti... • Select All Filtered: Every entity tha... Price List table is selected. • Unselect All: Any selected entity is... at least one entity is selected.
⚙ icon	Click the icon and select one of the ava... ◄ Move column ► Move column ✕ Remove colum...
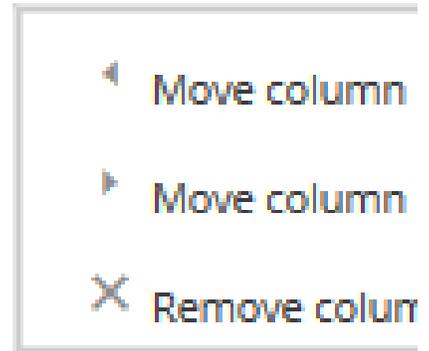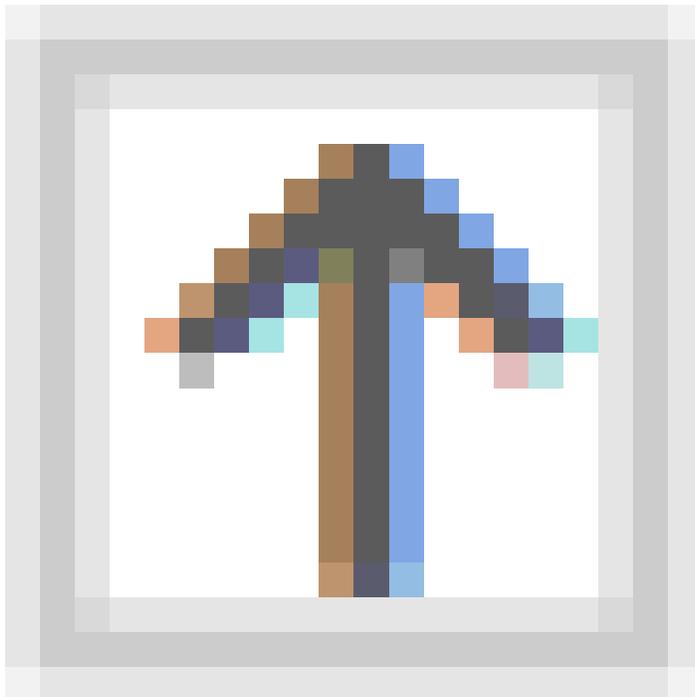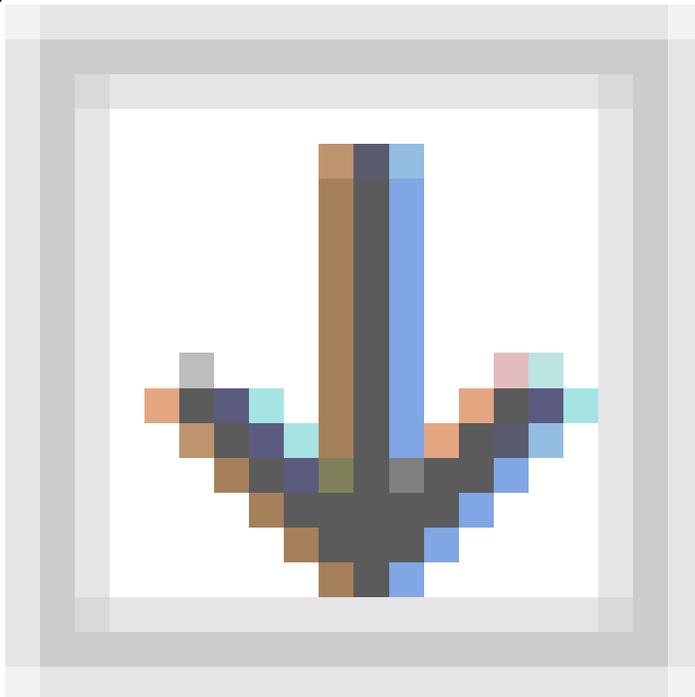
You can click one of the icons to sort
set an ascending or descending sort or

To change the sorting direction

/

icon

Context menu	Right-click on the table row to display the menu are displayed accordingly to
	The menu is interactive. The op

Edit column	You can click the icons in appropriate

Search Filter panel

You can narrow down your search results for a desired entity with the search filter.

The Search Filter panel contains individual fields. The search results are updated in real-time when you perform an operation on one of the fields.

You can configure the Search Filter fields for a given object.

Smart Views are fully customizable, therefore the example view provided may be different than what you can see on your screen.
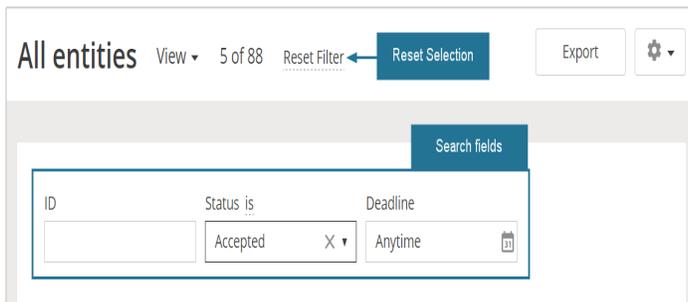
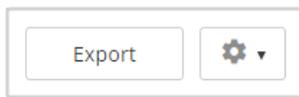| Reset Filter button	Click to restore the default settings of
	Please keep in mind that the se some default value or setting. \ restore the default settings of a The button becomes available w
Search fields	You can define your search settings de perform the actions: • Type in the text into the field. • Click the drop-down menu and sel • Click the field and select the time
Search Field operator	Some of the fields have operators whic The operator is marked as a link in the

Categories is not

Op

Any   ✕ ▾

Click the icon to restore the default set
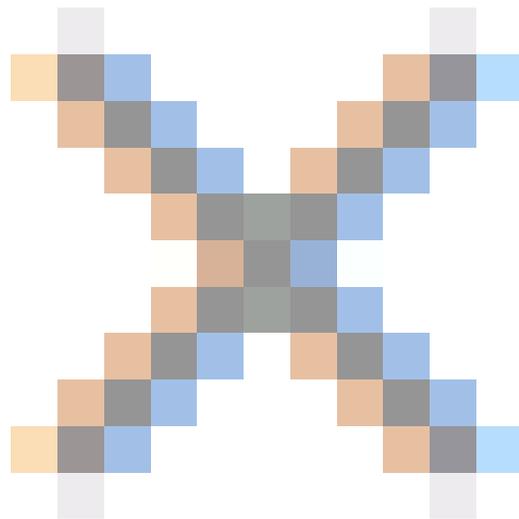
icon

Actions area

Use the buttons displayed to perform actions on the selected entities .			
	Export button	Click to format the data from the entity table. You can export the data to the file, therefore you click the button, the Export Data pop-up window appears.	

Action panel is an interactive field; it displays only buttons for actions which can be selected by a given user.
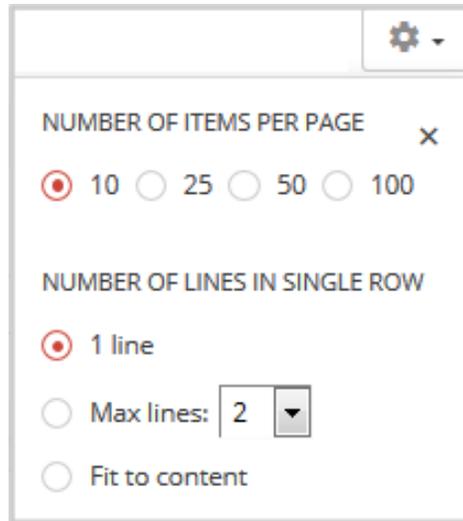
You can only perform the operations which you are given access to.

⊞   Export Data Pop-Up Window

this button only appears when none of the entities is selected.

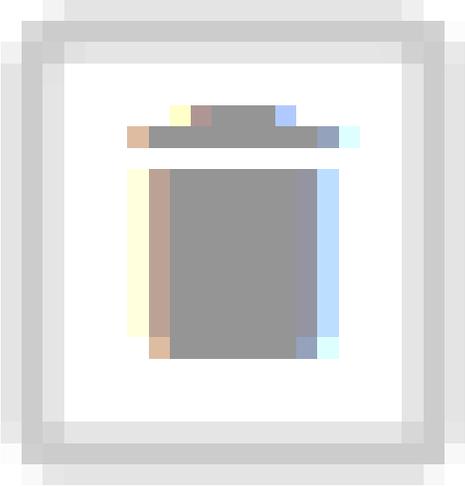|			
⚙ icon		NUMBER OF ITEMS PER PAGE ✕ ● 10 ○ 25 ○ 50 ○ 100 NUMBER OF LINES IN SINGLE ROW ● 1 line ○ Max lines: 2 ▼ ○ Fit to content	Use the radio button in the Number of items per be displayed on one page in the table below. Use the radio button in the Number of lines in a displayed in one table row, select: • 1 line - the table row contains 1 line regardl • Max lines: - use the drop-down menu to det table row. • Fit to content - the number of lines displayed depending on the amount of the displayed c

View drop-down menu

You can manage how and what information is displayed in the Offers table. Use the View drop-down menu to select and manage view . With this menu you can select the view you want to work with and also create new custom views.

Currently selected view title stands bold in the drop-down menu.

Smart Views are fully customizable, therefore the example view provided may be different than what you can see on your screen.

All Entities   View ▾   4

MY VIEWS

All Entities   ✎ ▢ 🗑
default   ✎ ▢ 🗑

Add New View

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