momentum SOFTWARE SOLUTIONS

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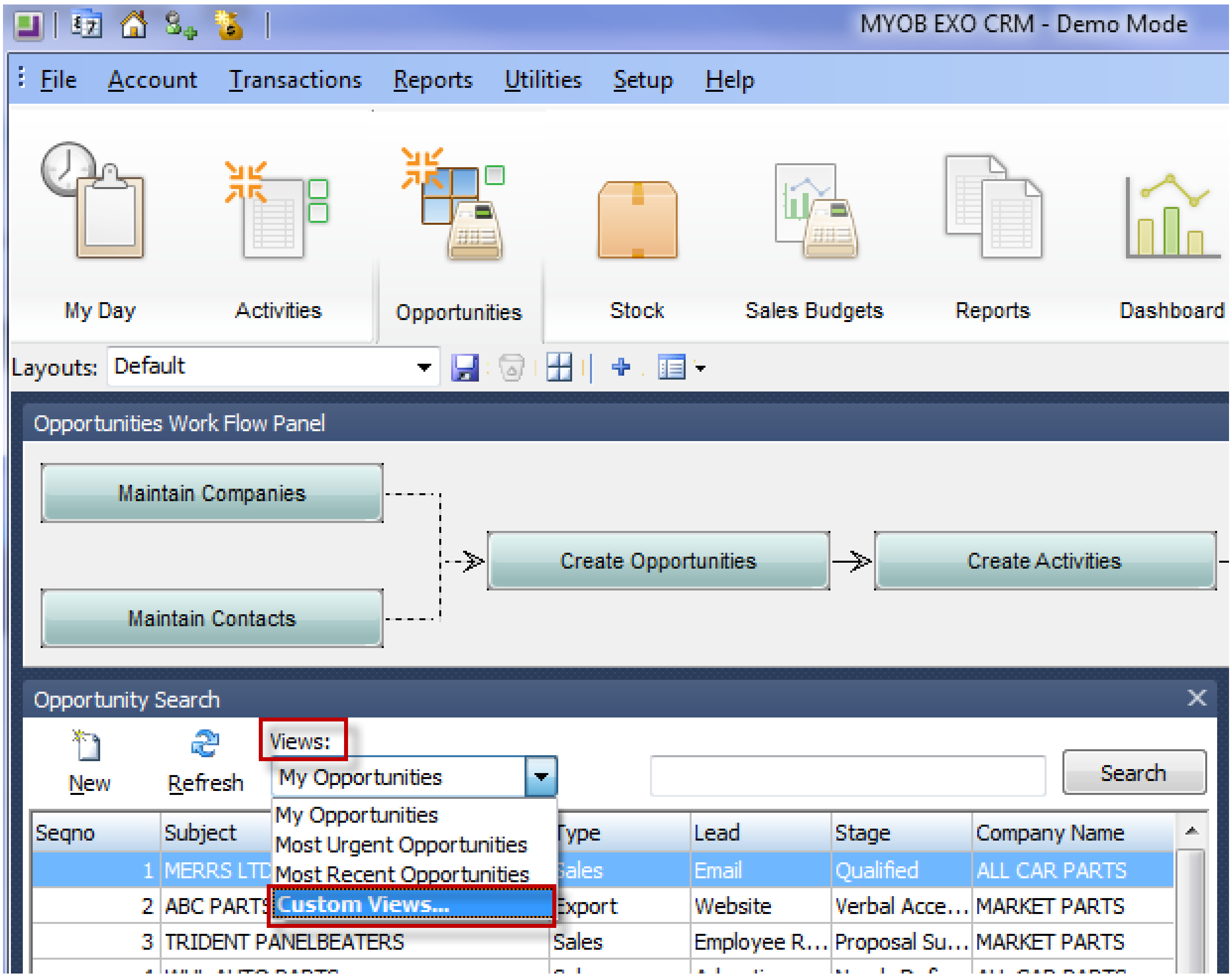
How to create Custom Views in CRM Opportunities

Overview

It is possible to set up Custom Views, so that only Opportunities that match the filters in the Custom View will display in the Opportunity Search window.

Step 1 – Click on the Opportunities icon

The click on the down arrow in the Views drop down, select Custom Views.



Step 2 – A popup will display, select New

Enter a View Name, then select the filters you require in each field, as per the example below;

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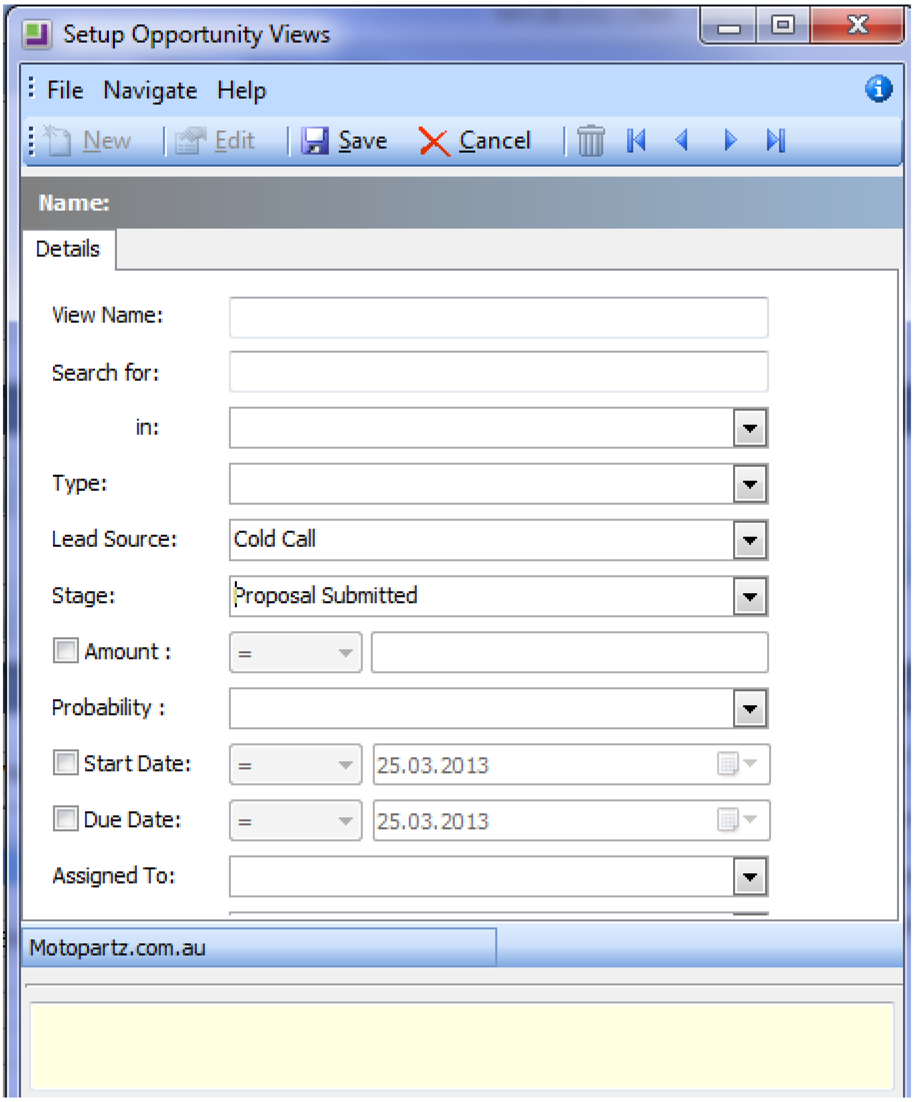

Step 3 – Save the Custom View

The view will then be available to select from the drop down list.