

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.

The screenshot shows the MYOB EXO CRM - Demo Mode interface. The main menu includes icons for My Day, Activities, Opportunities, Stock, Sales Budgets, Reports, and Dashboard. The Opportunities icon is highlighted. Below the main menu is the Opportunities Work Flow Panel with buttons for Maintain Companies, Maintain Contacts, Create Opportunities, and Create Activities. The Opportunity Search window is open, showing a table of opportunities. The Views dropdown menu is open, and 'Custom Views...' is highlighted.

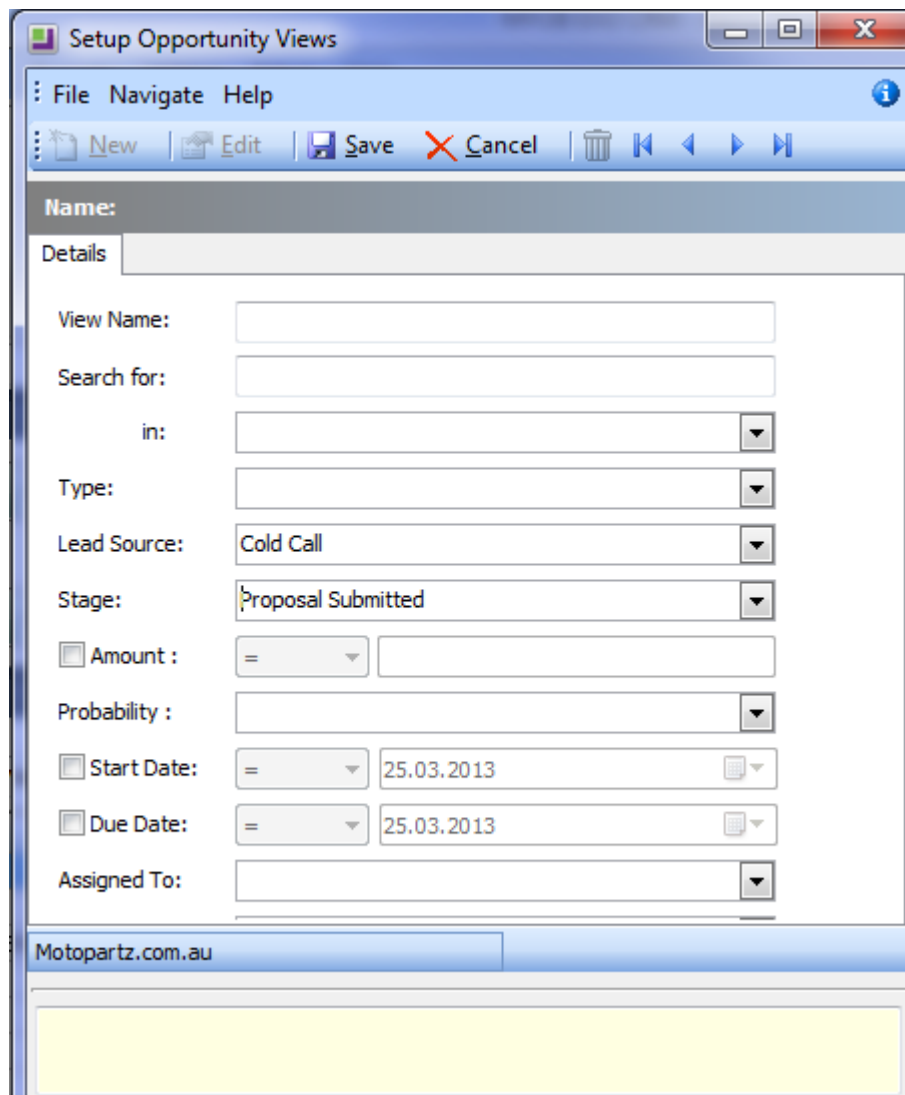
Seqno	Subject	Type	Lead	Stage	Company Name
1	MERRS LTD	Sales	Email	Qualified	ALL CAR PARTS
2	ABC PARTS	Export	Website	Verbal Acce...	MARKET PARTS
3	TRIDENT PANELBEATERS	Sales	Employee R...	Proposal Su...	MARKET PARTS

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.