

Workflow Keywords

We have added the following Workflow Keywords to the workflow functions as follows:

1. Leads Workflow

{Company} = Company Name
{Surname} = surname
{FirstName} = First Name
{Tel} = Telephone No
{Cell} = Cell No
{Email} = Email address
{Notes} = Notes

2. Companies Workflow

{Company} = Company Name
{Contact} = Contact Name
{Tel} = Telephone No
{Cell} = Cell No
{Email} = Email Address

3. Opportunities

{OppName} = Opportunity Name
{ExpOrderDate} = Expected Sales Date
{Prob} = Probability %
{PotValue} = Potential Sales Value
{QuoteExpiry} = Quote Expiry Date
{QuoteDate} = Quote Date
{QuoteNo} = QuoteNo
{Company} = Company Name
{DateLogged} = Date Logged
{Contact} = Contact
{Notes} = Notes
{Cell} = Cell
{Tel} = Tel
{Email} = Email

4. Current Products

{PurchaseDate} = Purchase Date
{AgreementExpiryDate} = Agreement Expiry Date
{Notes} = Notes
{PurchasePrice} = Purchase Price
{Product} = Product Description
{AssetNo} = Asset No
{Contact} = Contact
{Cell} = Cell
{Tel} = Tel
{Email} = Email