

Would you like to capture more information when someone closes an Opportunity?

The default Opportunity Close form allows you to enter the Actual Revenue, Close Date, a related Competitor and a Description. If there is additional information that would be beneficial to your business this form can be customised in the same way as any other forms.

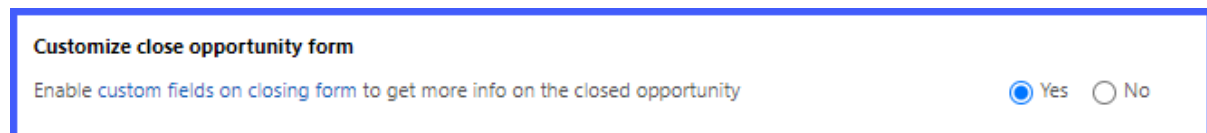
System Settings

Firstly, there is a system setting to allow the Opportunity Close forms to be customised.

Either from Advanced Find or Power Platform Admin Centre (PPAC) navigate to

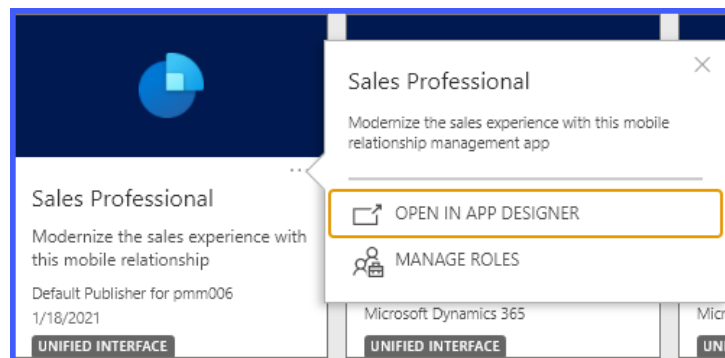
Settings > Administration > System Settings > Sales

Customise close opportunity form



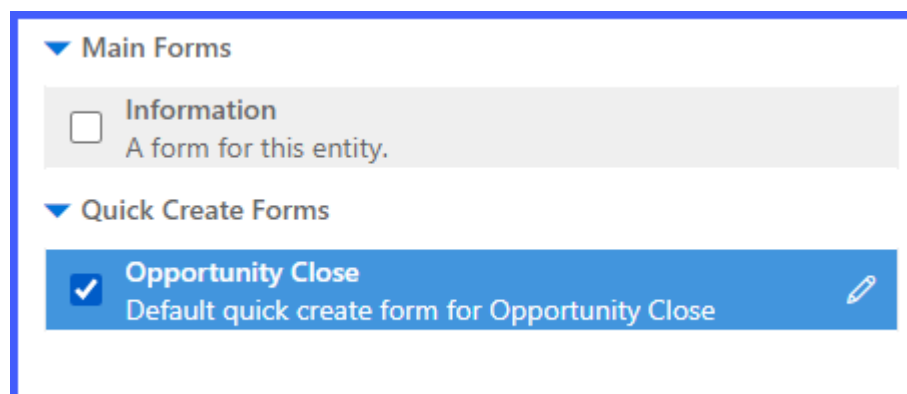
Customise the Form

From Advanced Setting navigate to Apps and open your app in the App Designer.



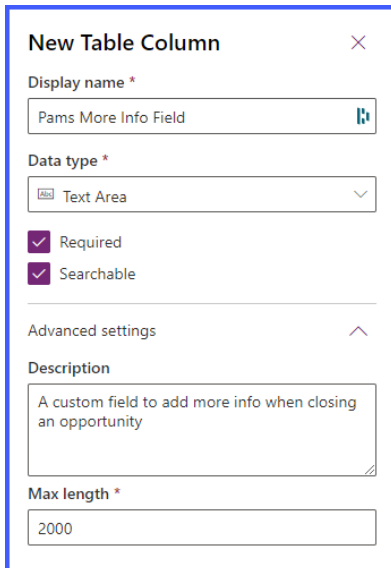
Scroll down to the Opportunity Close entity.

Click on Forms and on the right select the form to customise.



Our recommendation is always to make a copy of the form (Save As) and edit that rather than the original.

Add in any additional standard or new fields (New Table Column) as required.



New Table Column [Close]

Display name *
Pams More Info Field

Data type *
Text Area

Required
 Searchable

Advanced settings [Expand]

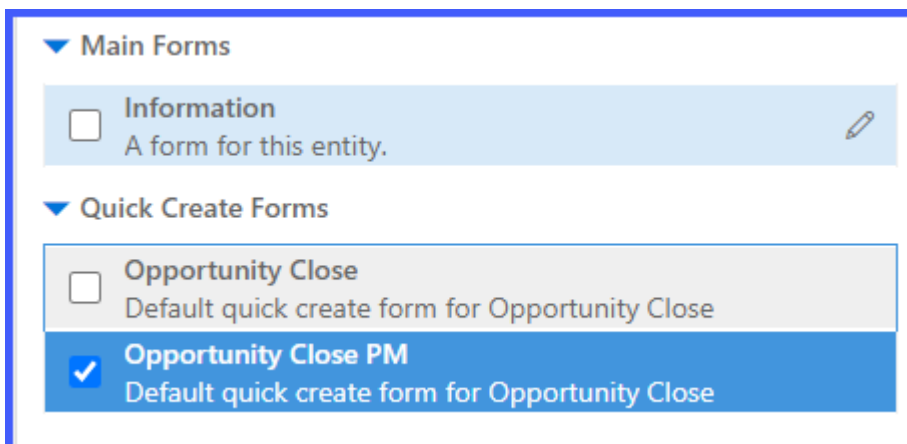
Description
A custom field to add more info when closing an opportunity

Max length *
2000

Save and publish the form. Then close the form editor.

In the Site Map make sure the new form is selected – and the original is de-selected.

Save and Publish your site map.



▼ Main Forms

Information
A form for this entity.

▼ Quick Create Forms

Opportunity Close
Default quick create form for Opportunity Close

Opportunity Close PM
Default quick create form for Opportunity Close

Next time an Opportunity is Closed as Won/Lost the new form will be used.

(Note: it does seem that sometimes you need to go to the Classic UI and publish from there before the changes are seen in the App).