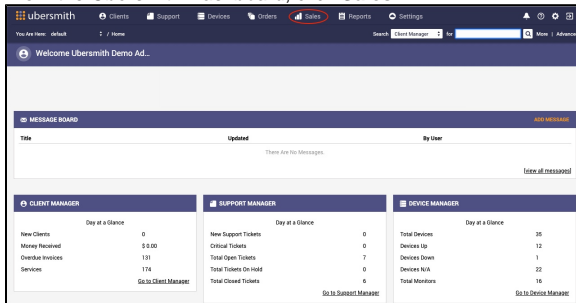


Adding Opportunities

An opportunity is used to track a potential sale for either a new lead or an existing client, managed in the Sales Manager. You can move opportunities through various stages before they reach the quoting phase.

Once a service is sold and a contract is signed, the lead will first be converted to a full client, then the order is processed.

1. From the *Ubersmith Dashboard*, click **Sales**.



The *Sales Manager Dashboard* appears.

2. From the *Add Opportunity* section, click either **New Lead** for someone not already in Ubersmith, then enter the lead's name in the *Add Lead* section or click **Client ID** for an existing client or lead. You can also click search to open the *Find a Client/Lead* page.
3. In the **Name** field, enter the name of the opportunity, such as the service being sold.
4. In the **Status** field, select the status of the opportunity, either **Open**, **Won**, **Lost** or **Cancelled**.
5. In the **Stage** field, select the stage of the opportunity. These options will vary based on your customized choices. See [Opportunity Stages](#) for more information.
6. In the **Type** field, select the type of opportunity. These options will vary based on your customized choices. See [Opportunity Types](#) for more information.
7. In the **Next Step** field, enter the next step to take with the opportunity.
8. In the **Closure** field, enter the numeral percentage of your expectation on selling the service.
9. In the **Date** field, enter the current date.
10. In the **Value** field, enter the price range of the expected revenue.
11. Click **Add Opportunity**.

The screenshot shows the 'ADD LEAD' and 'ADD OPPORTUNITY' forms. The 'ADD LEAD' form has fields for First Name, Last Name, Company, Phone, Email, Source, and Salesperson. The 'ADD OPPORTUNITY' form has fields for Name, Status, Type, Closure, Date, and Value. The 'Status' field is set to 'Open', 'Type' is 'Amazon Web Services', 'Closure' is '0 %', 'Date' is 'Jan/01/1970', and 'Value' is '\$ 0 - \$'. The 'Add Opportunity' button is highlighted with a red circle.

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