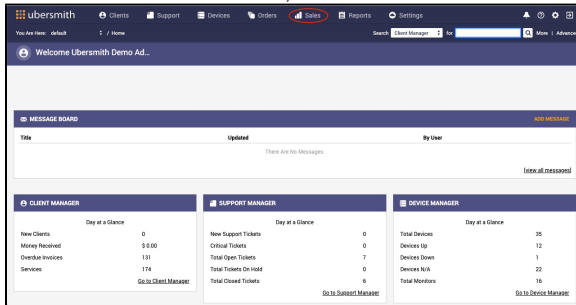


Managing Opportunities

Once you have [created an opportunity](#), you can perform various actions on it.

Filtering Opportunities

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

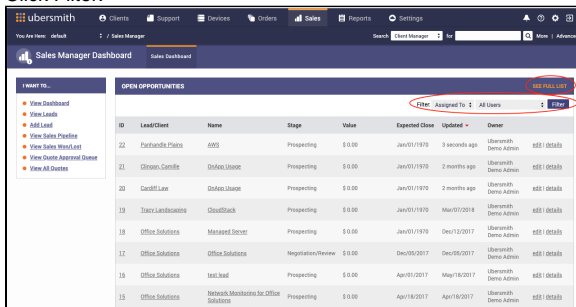


The *Sales Manager Dashboard* appears.

2. In the *Open Opportunities* section, click **See Full List** to display your entire list of opportunities.
3. In the **Filter** field, select one of the following:

- Assigned to and a specific user's name to find that person's opportunities
- Sales Stage and the specific stage to find opportunities in that stage.
- Value and the price range to find opportunities within the value.
- Updated and the since date to find opportunities that have been updated on or after that date

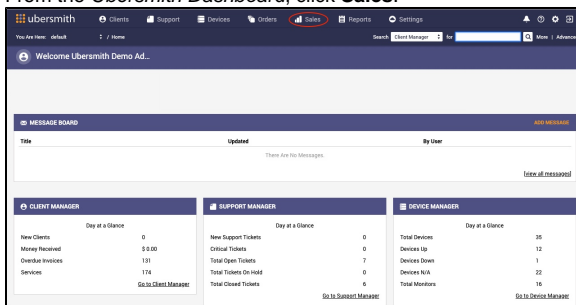
4. Click **Filter**.



Accessing the View Opportunity Page

From the *View Opportunity* page, you can see your opportunity, along with the ability to update opportunity information and the opportunity description, as well as adding tickets, comments, and quotes.

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



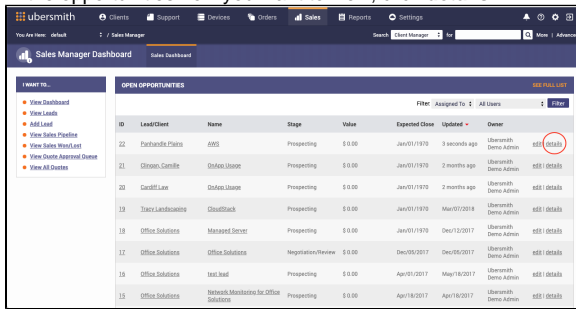
The *Sales Manager Dashboard* appears.

On this page:

On this page:

- [Filtering Opportunities](#)
- [Accessing the View Opportunity Page](#)
- [Editing Opportunity Information](#)
- [Editing Opportunity Description](#)
- [Adding Tickets](#)
- [Adding Opportunity Comments](#)
- [Adding Quotes](#)
- [Related Topics](#)

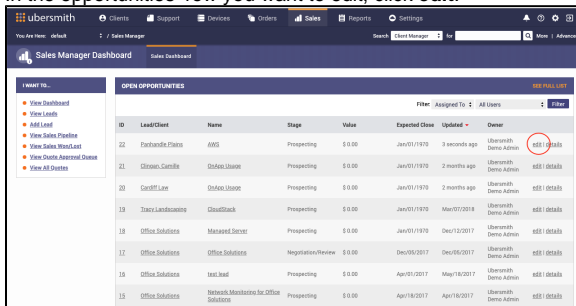
- In the opportunities' row you want to view, click **details**.



The *View Opportunity* page appears.

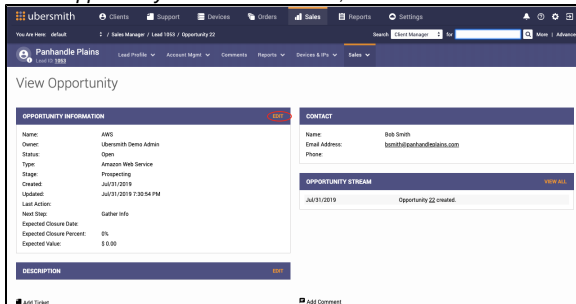
Editing Opportunity Information

- From the *Ubersmith Dashboard*, click **Sales**. The *Sales Manager Dashboard* appears.
- In the opportunities' row you want to edit, click **edit**.



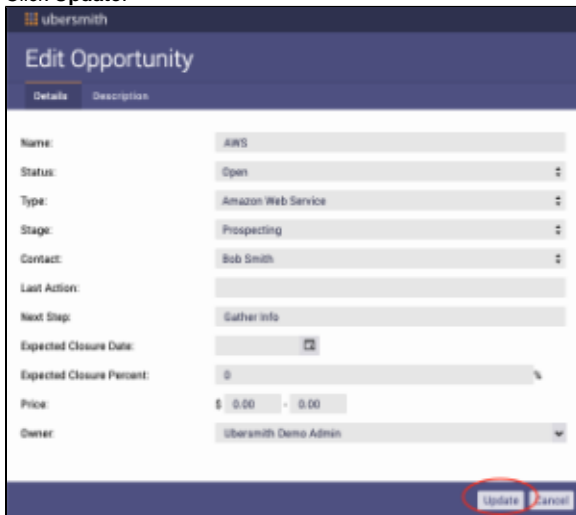
OR

- Access the *View Opportunity* page.
- In the *Opportunity Information* section, click **edit**.



The *Edit Opportunity* page appears with the *Details* tab active.

- Make any necessary changes.
- Click **Update**.



Editing Opportunity Description

1. Access the [View Opportunity](#) page.
2. In the *Description* section, click **edit**.

View Opportunity

OPPORTUNITY INFORMATION	CONTACT
Name: AWS Owner: Ubersmith Demo Admin Status: Open Type: Amazon Web Service Stage: Prospecting Created: Jul/31/2019 Updated: Jul/31/2019 7:30:54 PM Last Action: Next Step: Gather Info Expected Closure Date: Expected Closure Percent: 0% Expected Value: \$ 0.00	Name: Bob Smith Email Address: bsmith@ubersmithdemo.com Phone:

OPPORTUNITY STREAM	
Jul/31/2019	Opportunity 22 created.

DESCRIPTION **edit**

Add Ticket There are no tickets.

Add Ticket There are no orders.

Add Comment There are no comments.

Add Comment There are no comments.

Add Quote There are no quotes.

The *Edit Opportunity* page appears with the *Description* tab active.

3. Make any necessary changes.
4. Click **Update**.

ubersmith

Edit Opportunity

Details **Description**

Client is looking for Amazon Web Services.

Update **Cancel**

Adding Tickets

1. Access the [View Opportunity](#) page.
2. Click **Add Ticket**.

View Opportunity

OPPORTUNITY INFORMATION	CONTACT
Name: AWS Owner: Ubersmith Demo Admin Status: Open Type: Amazon Web Service Stage: Prospecting Created: Jul/31/2019 Updated: Aug/01/2019 1:26:22 PM Last Action: Next Step: Gather Info Expected Closure Date: Expected Closure Percent: 0% Expected Value: \$ 0.00	Name: Bob Smith Email Address: bsmith@ubersmithdemo.com Phone:

OPPORTUNITY STREAM	
Aug/01/2019	Expected Closure Date changed from Jan/01/2020 to Aug/01/2019
Jul/31/2019	Description set to Client is looking for Amazon Web Services.
Jul/31/2019	Opportunity 22 created.

DESCRIPTION **edit**

Add Ticket There are no tickets.

Add Ticket There are no orders.

Add Comment There are no comments.

Add Comment There are no comments.

Add Quote There are no quotes.

The *Email Client* page appears.

3. See [Submitting Tickets](#) for more information.
4. Click **Send** or **Send & New**.

Adding Opportunity Comments

1. Access the [View Opportunity](#) page.

2. Click **Add Comment**.

View Opportunity

OPPORTUNITY INFORMATION		CONTACT	
Name:	AWS	Name:	Bob Smith
Owner:	Ubersmith Demo Admin	Email Address:	bob@ubersmithdemo.com
Status:	Open	Phone:	
Type:	Amazon Web Service		
Stage:	Prospecting		
Created:	Jul/31/2019		
Updated:	Aug/01/2019 1:26:22 PM		
Last Action:			
Next Step:	Gather Info		
Expected Closure Date:			
Expected Closure Percent:	0%		
Expected Value:	\$ 0.00		

DESCRIPTION
Client is looking for Amazon Web Services.

OPPORTUNITY STREAM

Aug/01/2019	Expected Closure Date changed from Jan/01/1970 to Description set to Client is looking for Amazon Web Services.
Jul/31/2019	Opportunity 22 created.

Add Ticket There are no tickets. **Add Comment** There are no comments.

Add Ticket There are no orders. **Add Quote** There are no quotes.

The *Add Opportunity Comment* page appears.

3. In the **Comment** field, enter your comment related to the opportunity and attach any files, as needed.
4. Click **Save** or **Save & New**.

ubersmith **Panhandle Plains**
Client ID: 1053

Add Opportunity Comment

From: Ubersmith Demo Admin

Comment: The AWS service is for storage.

Attachments:
Choose File No file chosen

Save Save & New Cancel

Adding Quotes

1. [Access the View Opportunity page.](#)
2. Click **Add Quote**.

View Opportunity

OPPORTUNITY INFORMATION		CONTACT	
Name:	AWS	Name:	Bob Smith
Owner:	Ubersmith Demo Admin	Email Address:	bob@ubersmithdemo.com
Status:	Open	Phone:	
Type:	Amazon Web Service		
Stage:	Prospecting		
Created:	Jul/31/2019		
Updated:	Aug/01/2019 1:26:22 PM		
Last Action:			
Next Step:	Gather Info		
Expected Closure Date:			
Expected Closure Percent:	0%		
Expected Value:	\$ 0.00		

DESCRIPTION
Client is looking for Amazon Web Services.

OPPORTUNITY STREAM

Aug/01/2019	Expected Closure Date changed from Jan/01/1970 to Description set to Client is looking for Amazon Web Services.
Jul/31/2019	Opportunity 22 created.

Add Ticket There are no tickets. **Add Comment** There are no comments.

Add Ticket There are no orders. **Add Quote** There are no quotes.

The *Add Quote* page appears. See [Adding Quotes](#) for more information.

Related Topics

[Sales Manager](#)