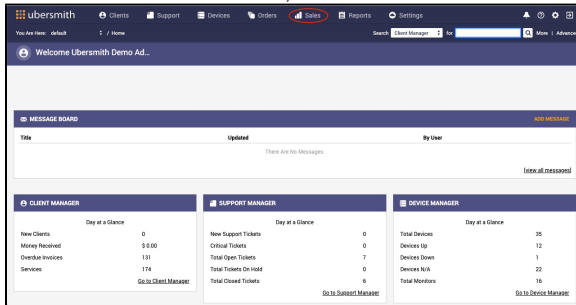


Managing Opportunities

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

Filtering Opportunities

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

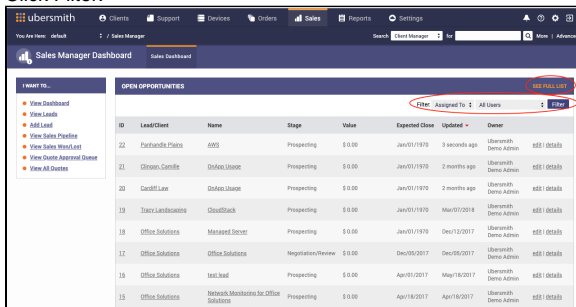


The *Sales Manager Dashboard* appears.

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

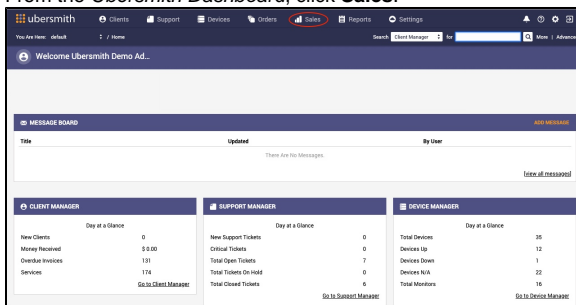
4. Click **Filter**.



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**.



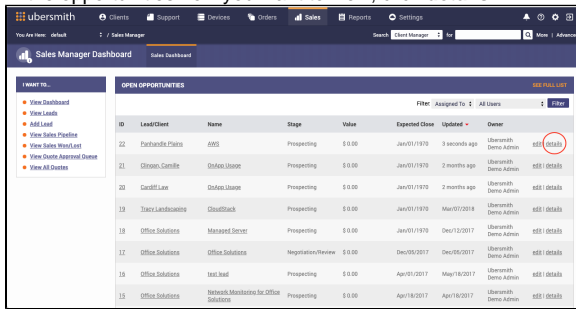
The *Sales Manager Dashboard* appears.

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](#)

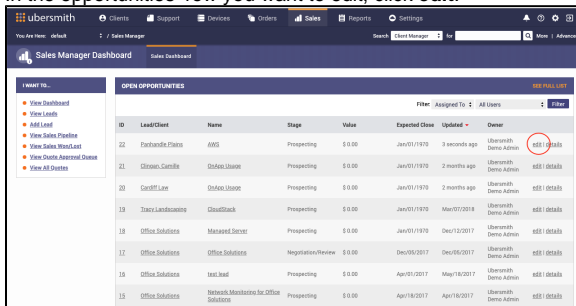
- In the opportunities' row you want to view, click **details**.



The *View Opportunity* page appears.

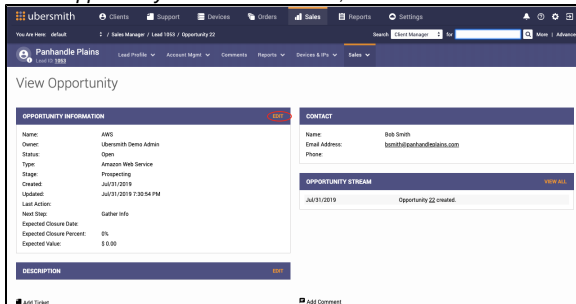
Editing Opportunity Information

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



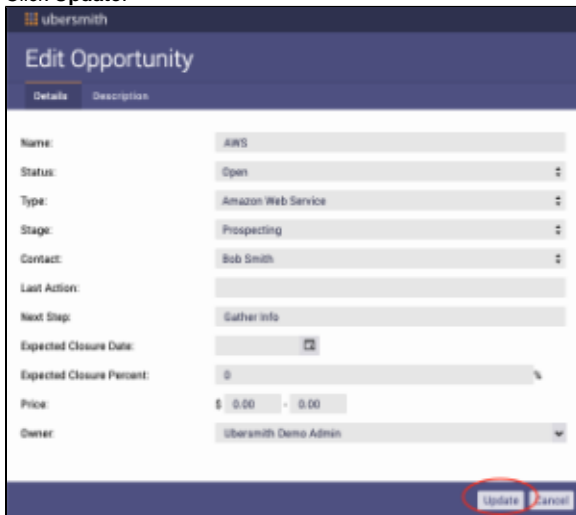
OR

- 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 **edit**

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

CONTACT

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 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 **edit**

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

CONTACT

Name: Bob Smith
Email Address: bsmith@ubersmithdemo.com
Phone:

OPPORTUNITY STREAM

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

DESCRIPTION **edit**

Client is looking for Amazon Web Services.

Add Ticket There are no tickets.

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:	basmith@panhandleplains.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.

There are no tickets.

There are no comments.

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**.

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Add Opportunity Comment Panhandle Plains Client ID: 1053

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:	basmith@panhandleplains.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.

There are no tickets.

There are no comments.

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](#)