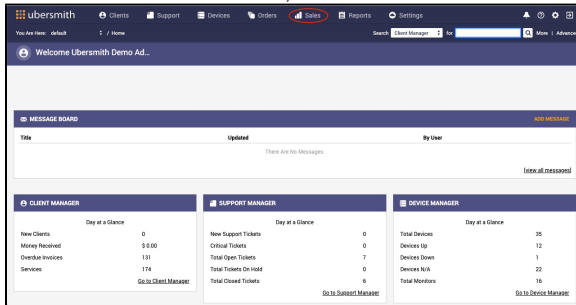


Managing Opportunities

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

Filtering Opportunities

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

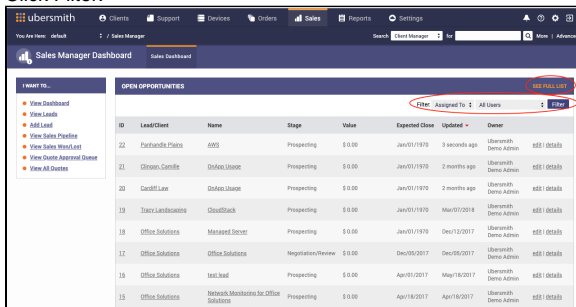


The *Sales Manager Dashboard* appears.

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

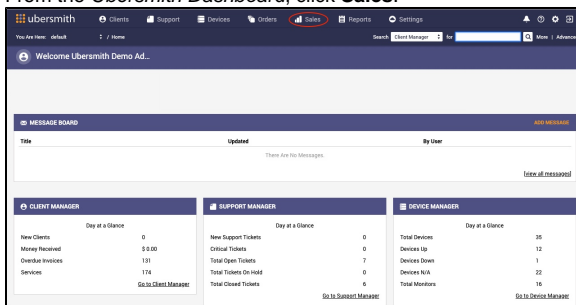
4. Click **Filter**.



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**.



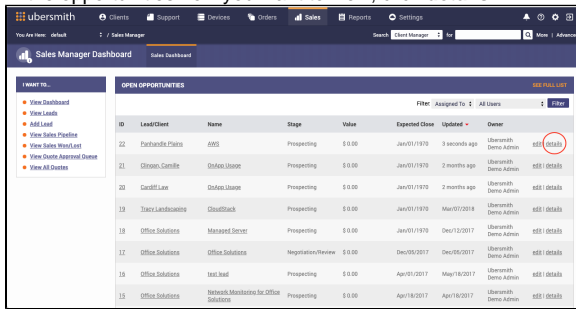
The *Sales Manager Dashboard* appears.

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](#)

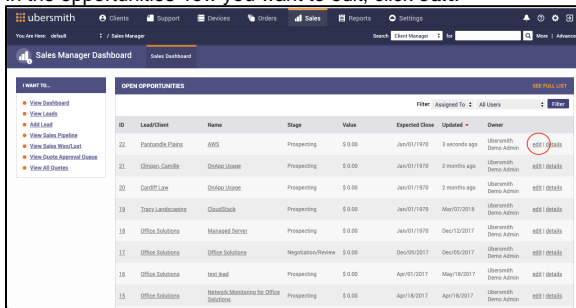
- In the opportunities' row you want to view, click **details**.



The *View Opportunity* page appears.

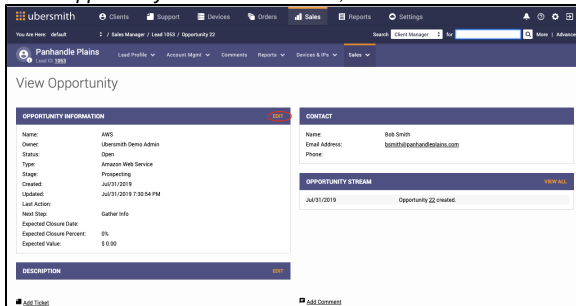
Editing Opportunity Information

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



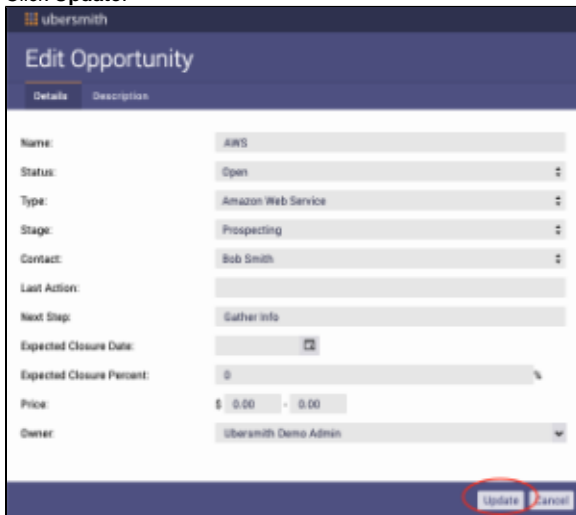
OR

- 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**.

The screenshot shows the 'View Opportunity' page for Client ID 1053. The 'OPPORTUNITY INFORMATION' section lists details like 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%), and Expected Value (\$ 0.00). The 'CONTACT' section lists Name (Bob Smith), Email Address (basm@ubersmithdemo.com), and Phone. The 'OPPORTUNITY STREAM' section shows a log of updates. The 'DESCRIPTION' section contains the text 'Client is looking for Amazon Web Services.' At the bottom, there are four buttons: 'Add Ticket', 'Add Comment' (circled in red), 'Add Order', and 'Add Quote'. Each button has a corresponding 'There are no [item]' message below it.

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**.

The screenshot shows the 'Add Opportunity Comment' page. The 'From' field is 'Ubersmith Demo Admin'. The 'Comment' field contains the text 'The AWS service is for storage.' Below the comment field is an 'Attachments' section with a 'Choose File' button and the text 'No file chosen'. At the bottom, there are three buttons: 'Save', 'Save & New' (circled in red), and 'Cancel'.

Adding Quotes

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

The screenshot shows the 'View Opportunity' page for Client ID 1053. The 'OPPORTUNITY INFORMATION' section lists details like 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%), and Expected Value (\$ 0.00). The 'CONTACT' section lists Name (Bob Smith), Email Address (basm@ubersmithdemo.com), and Phone. The 'OPPORTUNITY STREAM' section shows a log of updates. The 'DESCRIPTION' section contains the text 'Client is looking for Amazon Web Services.' At the bottom, there are four buttons: 'Add Ticket', 'Add Comment', 'Add Order', and 'Add Quote' (circled in red). Each button has a corresponding 'There are no [item]' message below it.

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

Related Topics

[Sales Manager](#)