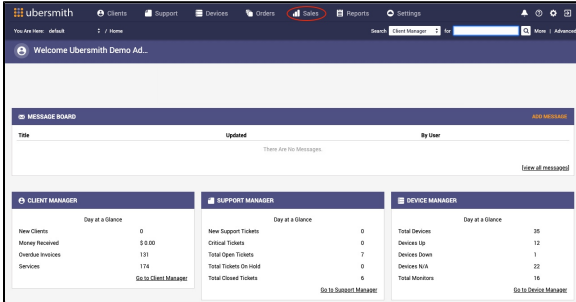


Adding Opportunities

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.

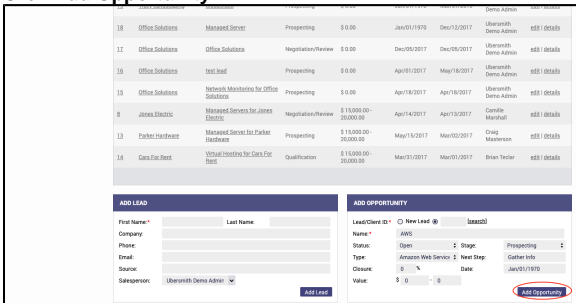
Once a service is sold and a contract is signed, the lead will first be converted to a full client, then the order is processed.

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**.



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