

Set Up and Manage Your Sales Team in Infusionsoft

Important! In order to be able to see and manage opportunity records, an admin must add you to the Sales Rep group!

Watch the Opportunity Management Overview Video

Watch the Plan Your Sales Stages Video

Edit the Default Pipeline Stage Settings

Before you begin setting up your sales pipeline, it is a good idea to [go through all of the default settings](#) and make any changes if needed.

Set Up Your Sales Pipeline Stages

Now that you understand the concepts, it time to start [setting up your sales pipeline](#) . Optionally, check out how to create [stage checklists](#) - these are check-boxes that the sales person needs to check in order to proceed to the next stage.

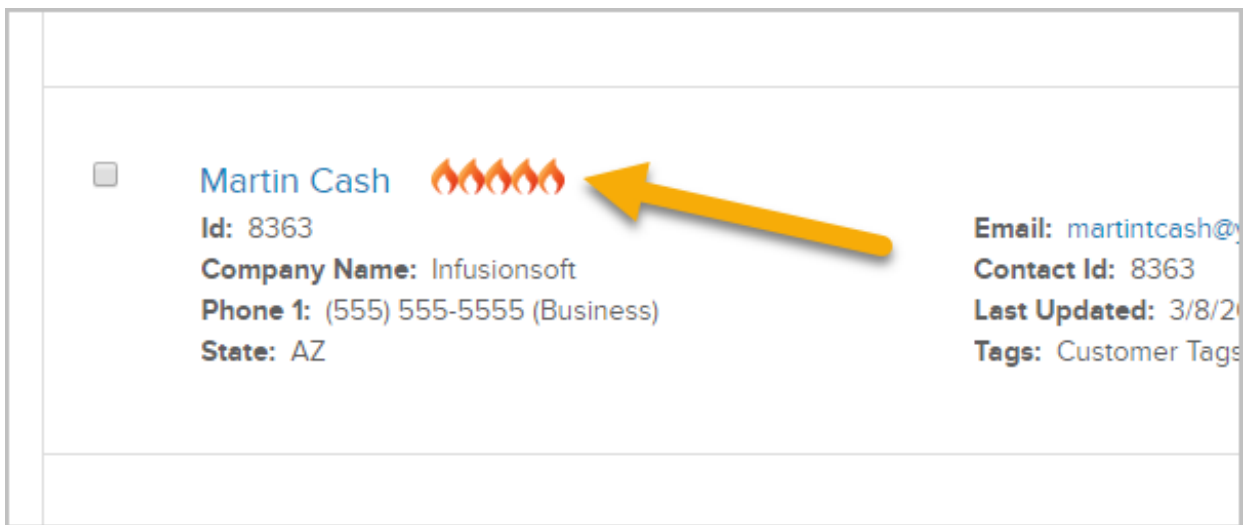
Add Users to the Sales Rep group

Before your users can start working their opportunities, you need to add them to the Sales Rep group. This will enable that user the ability to be assigned opportunity records.

Watch the Opportunity Record Overview Video

Set Up Lead Scoring

Lead scoring allows sales reps to focus on their hottest leads first.



Allow Your Reps to Manually Change a Lead Score

In order to allow your reps to [override the lead source score](#) you'll need to set a few things up first.

Assign Opportunities via a Round Robin

Now that you have your sales reps set and your pipeline stages ready to go, you'll need to figure out how you want to distribute leads as they come in. If you have multiple sales people, the best way to manage this is with a [Round-Robin](#) lead distribution rule.

Round Robin Name & Distribution Logic

Name

Sales Team Round Robin

Logic

☒ One record per round ?

☐ Distribute records based on ratio ?

Save

Save & Search

Integrate Pipeline Automation into Your Marketing Campaigns

Now it's time to automate! Learn how to automatically [create and distribute opportunities in a campaign](#) . You can also [automate marketing messages based on a sales person changing the sales stage of an opportunity](#).

Campaign Builder

Configure Stage Move

When moving

into

stage

MKTPL-Potential Lead

Please select one

MKTPL-Potential Lead

MKTPL-Qualified

MKTPL-Quote Sent

MKTPL-Quote Accepted

MKTPL-Lost

New Opportunity

Uncontacted

Configure your Dashboard to Manage Sales Rep

Activity & Effectiveness

Now that you have everything set up, it's time to track your pipeline and your sales team's effectiveness.

- The Opportunity Pipeline Summary is a good start to get a big picture snapshot showing opportunities in each stage, projected and weighted revenue, and average number of days spent in each stage.
- To get a more detailed [report showing all opportunities per rep](#) , the best thing to do is simply to search for opportunities belonging to a specific rep and then adding that report to your dashboard - then rinse and repeat so you have a dashboard widget for every sales person. Now, you can sign in to Infusionsoft and know exactly what leads each sales rep is working on.

Create Opportunity Records En Masse

[Click here](#) to create opportunities in a batch.
