Learn How Sales Reps Manage Leads 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 Opportunity Record Overview Video

See How to Create An Opportunity Record

Create an opportunity manually from a contact record.

Find Your Opportunity Records and Add Them to Your

Dashboard

Find your sales opportunities and add reports to your Dashboard

Work Your Leads

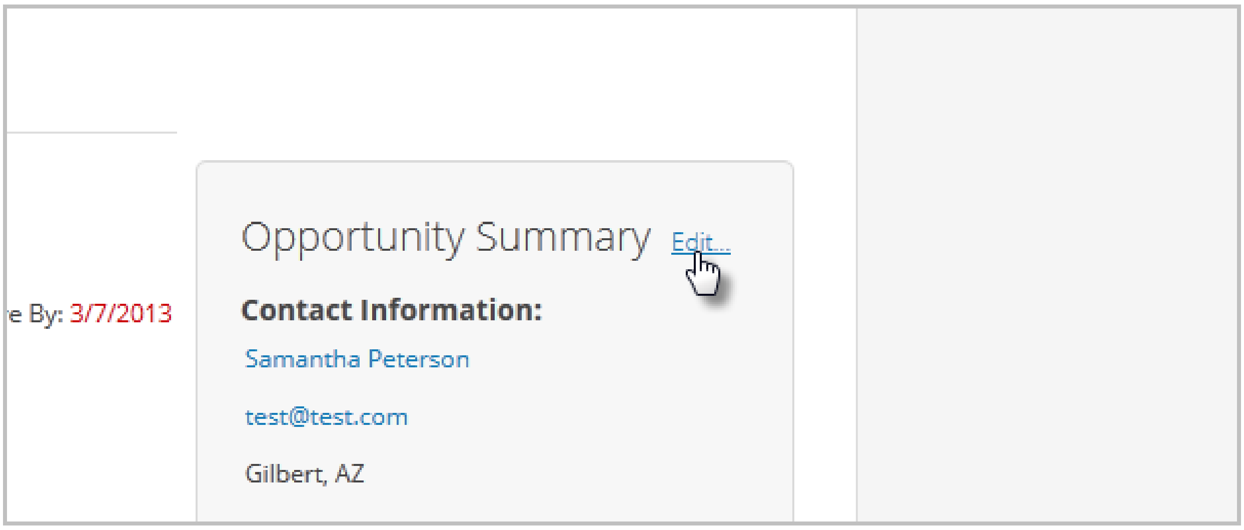
There are a few different ways to work your leads in Infusionsoft. One of the most common methods is searching for your leads and working them in the Interactive View - this allows you see a list of all your leads and interact with them without having to open each individual contact record.

How To Use The Next Action Fields In An Opportunity Record

Next action dates help you track task commitments related to the direct sales process. The idea is simple - enter notes and the next action date that you want this opportunity to show up on your dashboard. Click here for a more in-depth article .

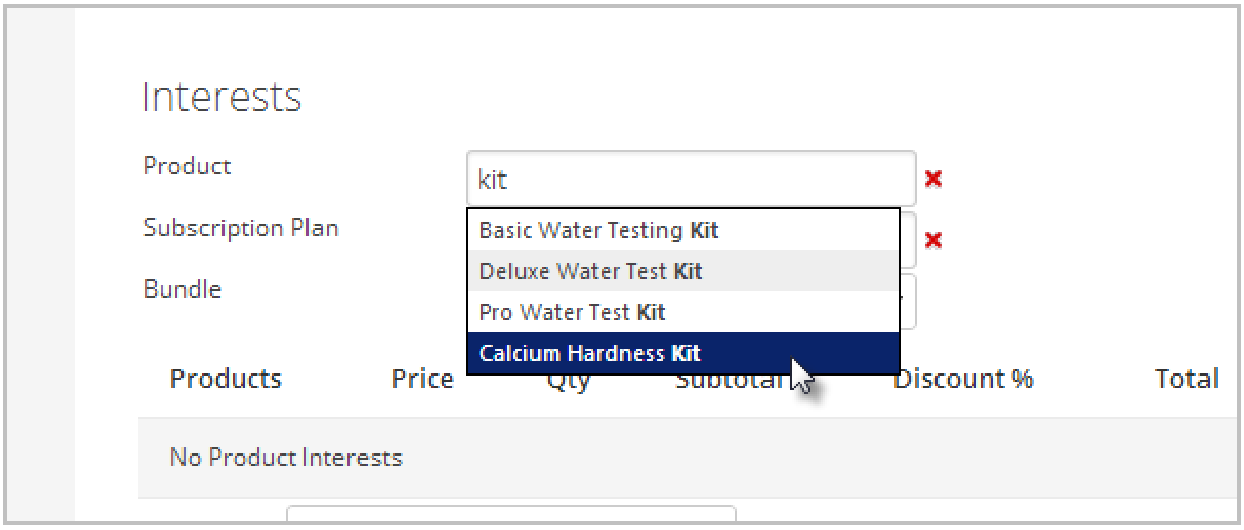
Update The Opportunity Summary

The opportunity summary section is the best place to keep information you want "front and center." It is like putting a sticky note at the top of the opportunity record.



Track Product Interest In An Opportunity Record

If you have our E-Commerce module, you can add the products and subscriptions that your opportunity is interested in. Doing this allows a sales manager to forecast revenue. Click here to learn more

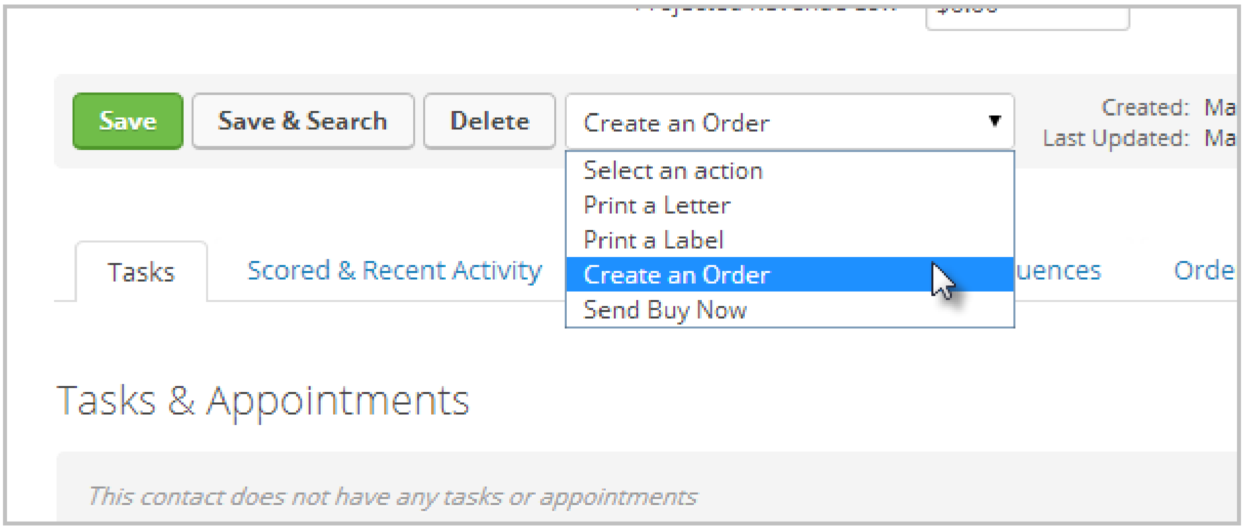


Send A Buy Now Link From An Opportunity Record

If you have the E-Commerce package and are tracking product interests (shown above), than you can send your opportunity a link to make the purchase online through the shopping cart.

Create An Order From an Opportunity Record

You can also create an order directly from the opportunity record.



Assign A Referral Partner To An Opportunity

If you are using the Referral Partner Management module, you can assign a referral partner to the opportunity . For example: Your company may have a partner program that pays referral partners commission for the leads they send to you. When a partner sends you a lead, you will need to make sure the referral is tracked in your opportunity record so that the affiliate will receive credit for the lead. The commission is calculated when the deal closes and a purchase is made.