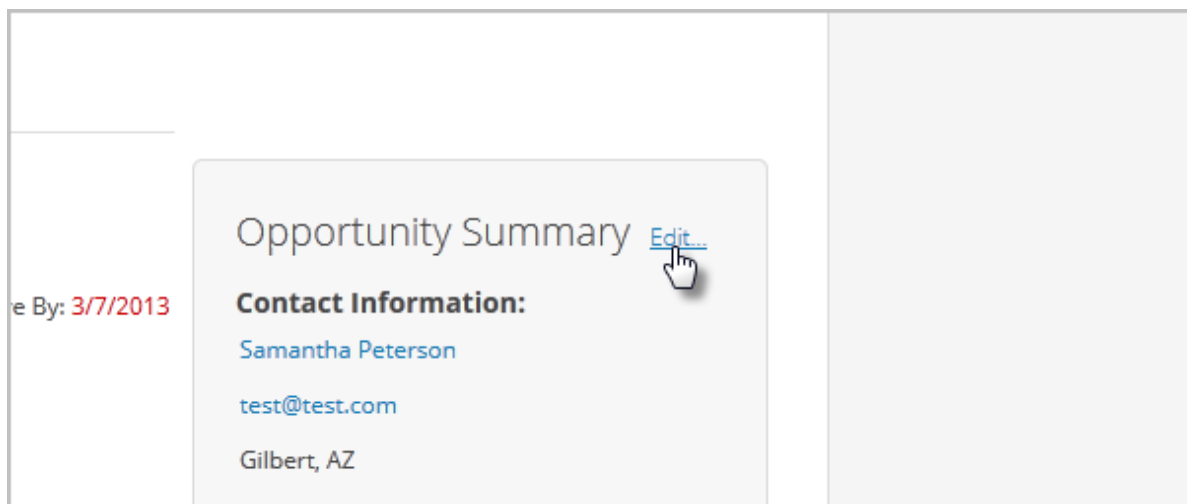


Update The Opportunity Summary🔗

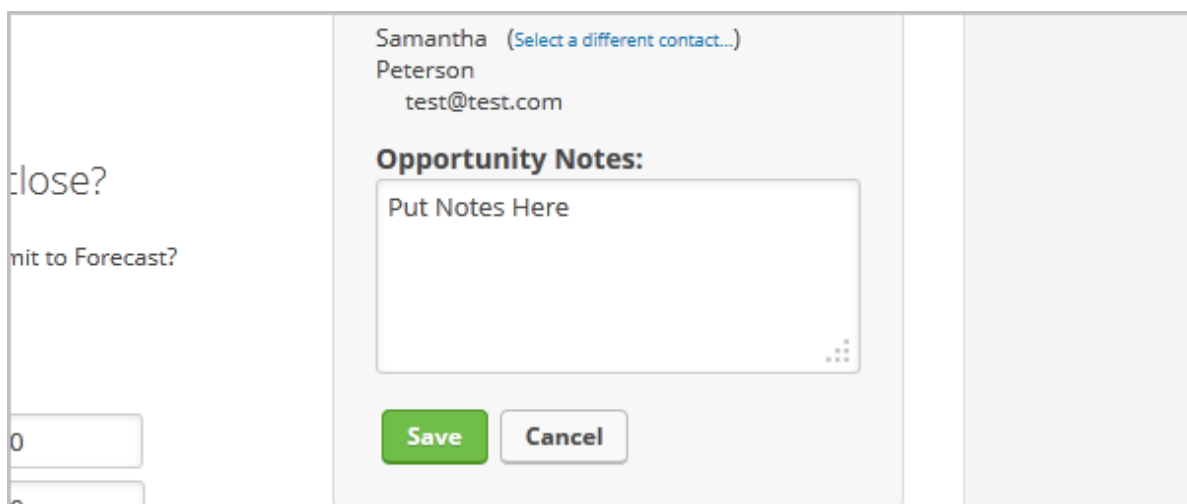
The opportunity summary includes basic contact information for your prospect and notes section. You can click on the prospect's name to view their contact record and/or click on their email address to send them a personal email. The opportunity notes section is the best place to keep information you want "front and center." It is like putting a sticky note at the top of the opportunity record . This information is visible at a glance - it does not get buried in the history. Use this area to keep track of the prospect's specific pain points, personal information (family, trips, hobbies), business description, etc. You can review this information quickly when you call the prospect or send them an email.

1. Click on **Edit** to add or update the summary notes or change the opportunity title.



The screenshot shows a web interface for an "Opportunity Summary". On the left, there is a label "e By: 3/7/2013". The main content area is a light gray box with the title "Opportunity Summary" and a blue "Edit..." link with a hand cursor icon. Below the title, the section "Contact Information:" is displayed, followed by the name "Samantha Peterson", the email "test@test.com", and the location "Gilbert, AZ".

2. Enter or add to the summary notes, and click on **Save**.



The screenshot shows the "Opportunity Summary" form with the "Opportunity Notes:" section expanded. The contact information "Samantha Peterson" and "test@test.com" is visible at the top, with a link "(Select a different contact...)" next to the name. Below the "Opportunity Notes:" label is a text area with the placeholder "Put Notes Here". At the bottom of the form, there are two buttons: a green "Save" button and a white "Cancel" button. On the left side of the form, there is a "close?" label and a "mit to Forecast?" label.

3. If your opportunity notes summary is lengthy, you can click on **Preview Notes** to open them in a new window.

Vendor

High

Low

Opportunity Notes.

Put Notes HerePut Notes HerePut
Notes HerePut Notes HerePut
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[Preview Notes](#)

Created: Mike Bast Wednesday, March 6, 2013 3:13 PM

Last Updated: Martin Cash Wednesday, May 15, 2013 4:49 PM
