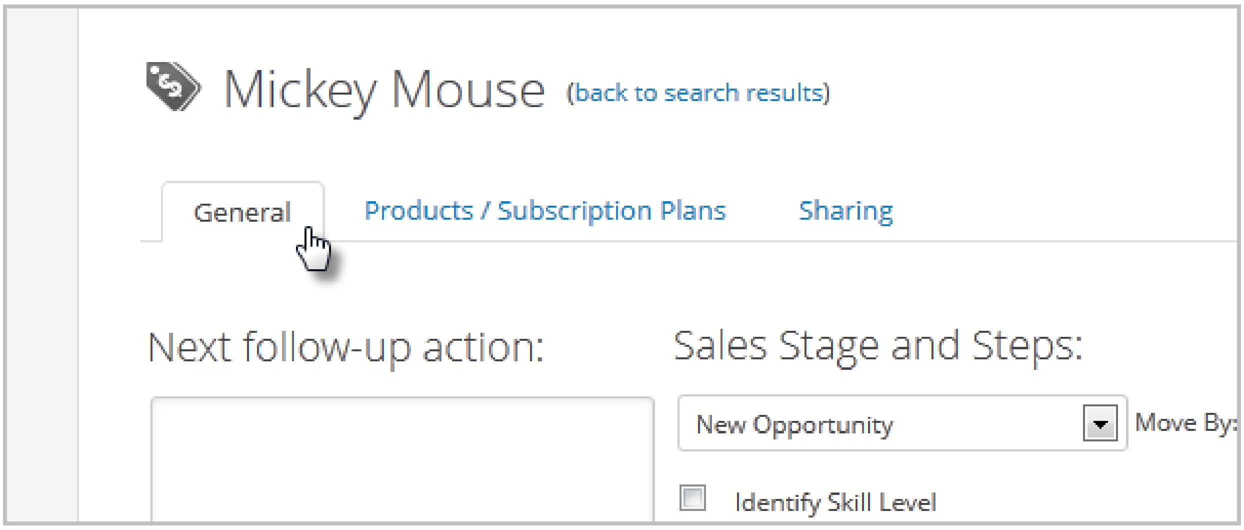
Opportunity Record Overview

Opportunity Records are used to track a sales process. They are primarily used by companies that have direct sales reps who manually interact with prospects as they are making a buying decision. Each opportunity record stores the history for one complete sales process from the time a lead begins working with a sales rep to the time that the deal closes or dies; it stores notes, next action dates, stage, product interest, and more. You can use the information in opportunities to monitor sales rep performance and forecast future sales revenue. Opportunity records are attached to a prospect's contact record.

The Top Row of Tabs

The top row of tabs is the navigation between sections of the opportunity record.



- **General**: This is the first section displayed when you view an Opportunity Record. It displays current Opportunity Information, including the next action date and notes, the assigned sales rep, the current sales stage, opportunity notes, and more. The sales rep can quickly link to the prospect's Person Record or send an email from here.
- **Products / Subscription Bundles**: A sales rep can track specific product interest and special pricing by attaching products and / or subscription programs to an Opportunity record. When the prospect decides to purchase, the sales rep can quickly generate an order or "Buy Now" order link to make it easy for the prospect to buy.
- **Custom Field** Tabs: These are tabs you create when you add custom fields for Opportunity Records (Admin > Settings). Custom fields contain information sales reps need to track for each prospective deal (e.g. Launch Date). Each Opportunity record can have different information in these fields, even if they are attached to the same Person Record. You create the tab labels when you create the custom fields.
- **Sharing**: This tab allows a user to share access to an opportunity record with other users or user groups / teams.

The Bottom Row of Tabs

The bottom row of tabs stores the person's activity history and purchase transactions.

- **Tasks**: The Tasks tab displays pending and completed tasks, date stamped note history, email correspondence, and click history, etc. You can also add new tasks, appointments, notes, and send emails from here.
- **Sales History**: The Sales History tab displays a date stamped record of stage movement, number of days between movement, user who moved the stage, and the assigned user (the one who "owns" the opportunity.)
- **Follow-Up Sequences**: This tab shows the person's follow-up sequence history. The

sequences that are active, paused and / or completed. Most of the time follow-up sequences are automated and require little to no intervention, but you can manually manage sequences from here when needed.

- Orders: If you are processing orders through Infusionsoft, this tab will house the purchase history. You can also manually manage orders, payments, refunds, and invoices from here.
- File Box: Use Infusionsoft for online document storage by uploading contracts, estimates, questionnaires, and more to an individual's file box. The documents loaded from an opportunity are stored in the contact record file box.

Opportunity Actions

You can print a letter, print a label, send a buy now link, or create an order from the action drop-down in the opportunity record. When printing a letter, you will choose from your library of letter templates.