

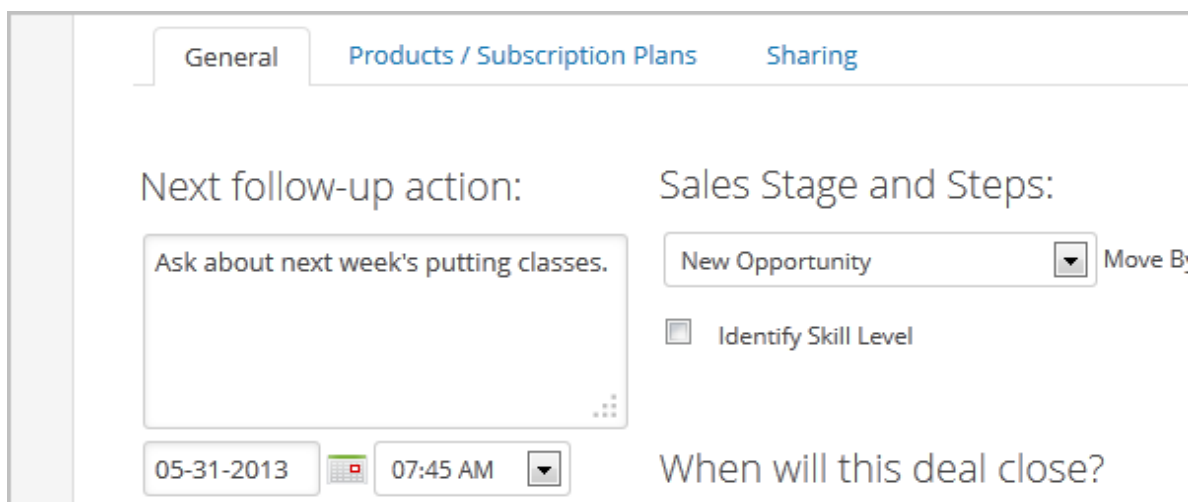
Next Action Fields In An Opportunity Record

After you create an opportunity or get assigned to one automatically, you'll use the opportunity record to keep a record of communication and progress through the sales process. Next action dates can help you track task commitments related to the direct sales process, however, there is no way to assign the "next action" to another Infusionsoft user. If you need to delegate, you should create a task for the person instead. Opportunity next action dates will show up on your Infusionsoft calendar as appointments in My Day (Note that it will not appear in the appointment section of the "Working" tab in My Day.)

Next Action Date and Notes

Use this area to enter a summary and date for the next manual follow up attempt (i.e. phone call, letter, meeting, etc.). The Next Action Date is used as a search criteria when you create an opportunity list. The notes will remind you of the details (e.g. call to schedule a demo.)

1. Review the next action summary and date.



The screenshot displays the 'General' tab of an Infusionsoft opportunity record. The 'Next follow-up action' section contains a text box with the text 'Ask about next week's putting classes.' Below this text box is a date field showing '05-31-2013', a calendar icon, and a time field showing '07:45 AM' with a dropdown arrow. To the right, the 'Sales Stage and Steps' section features a dropdown menu currently set to 'New Opportunity' with a 'Move B...' button next to it. Below the dropdown is a checkbox labeled 'Identify Skill Level'. At the bottom right of the form, the text 'When will this deal close?' is visible.

2. Click on **Add a Note to this Opportunity's history** to make notes about a recent interaction with the prospect and update the next action information as needed.

General Products / Subscription Plans Sharing

What did you do?

Called to schedule a meeting with Jerry, but he was out of town until next Thursday.

Sales Stage and Steps:

New Opportunity

☐ Identify Skill Level

When will this deal close

Here's the next follow-up

- (Optional) Mark the checkbox beside **Do you want to change it?** to update the next action summary and date. Enter the new next action summary and follow up date.

Do you want to change it?

☒ 05-31-2013 07:45 AM

Ask about next week's putting classes.

Save or Cancel

Projected Revenue

Projected Revenue High \$0.00

Projected Revenue Low \$0.00

- Click on **Save** to add the note to the opportunity history and update the next action information.

05-31-2013 07:45 AM

Ask about next week's putting classes.

Save or Cancel

Save Save & Search Delete Select an action

Tasks Scored & Recent Activity Sales History Follow-up Sequences

