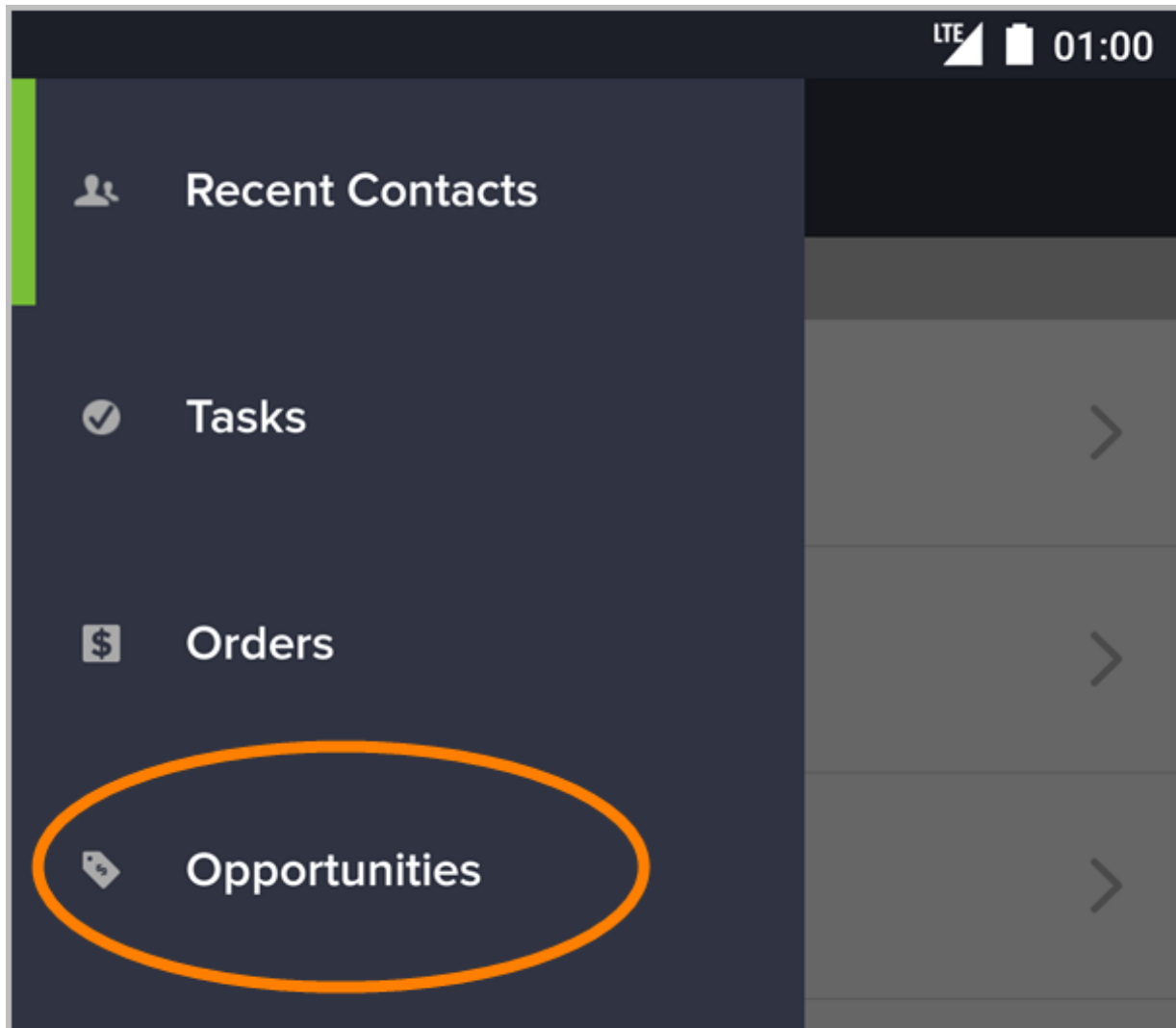


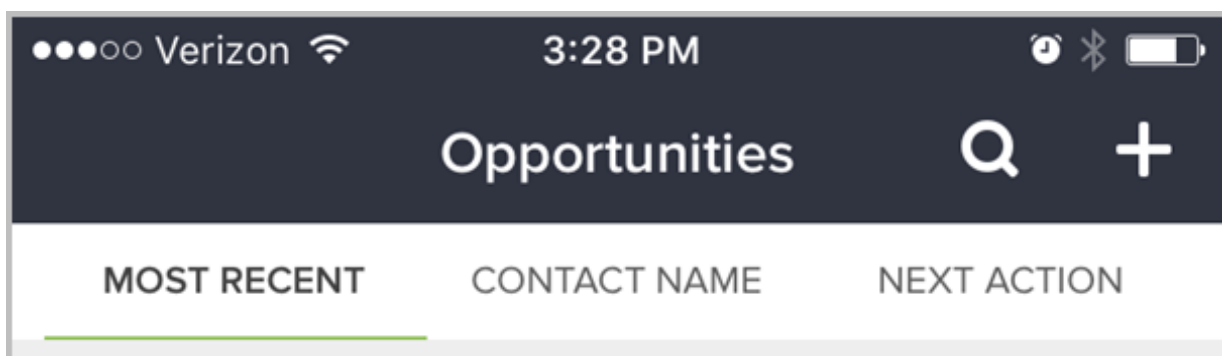
Infusionsoft Mobile Opportunities🔗

For both iOS and Android, there is an Opportunities option. Clicking on that option will take you to your list of opportunities.

On Android, Opportunities is available in the main menu:




On iOS, Opportunities is now an option in the bottom tab navigation:



New Opportunity (6)

The Big One

 \$50,000.00 - \$100,000.00

Christine Walker

Set up a dinner appointment and build the relationship.

 Next Action Date: Sep 23, 2016

Cha

 \$400

Ryan

Send th
differen

 Nex

Working (5)

Evjen Family Fall Shoot

 \$1,000.00 - \$3,000.00

Falk

 \$250



Recents



Opportunities



Tasks

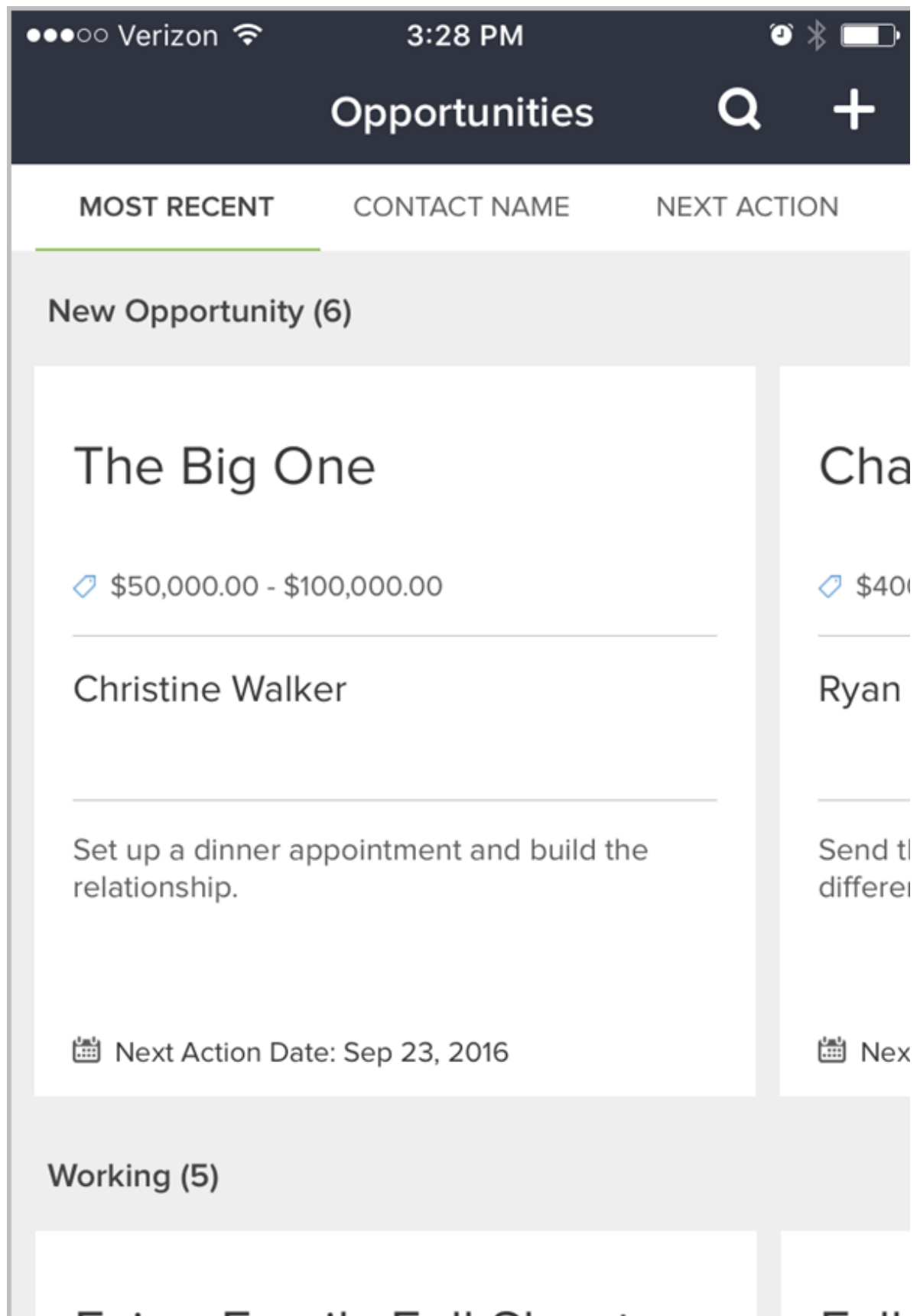


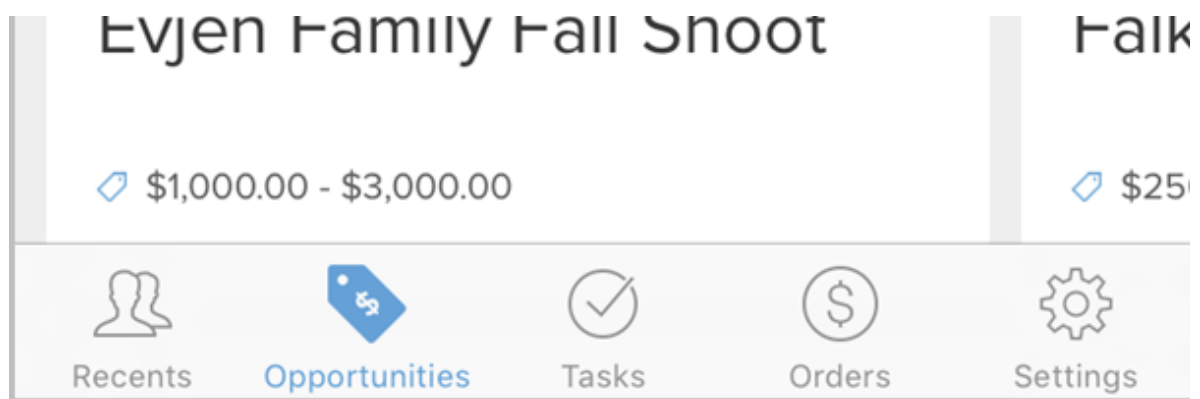
Orders



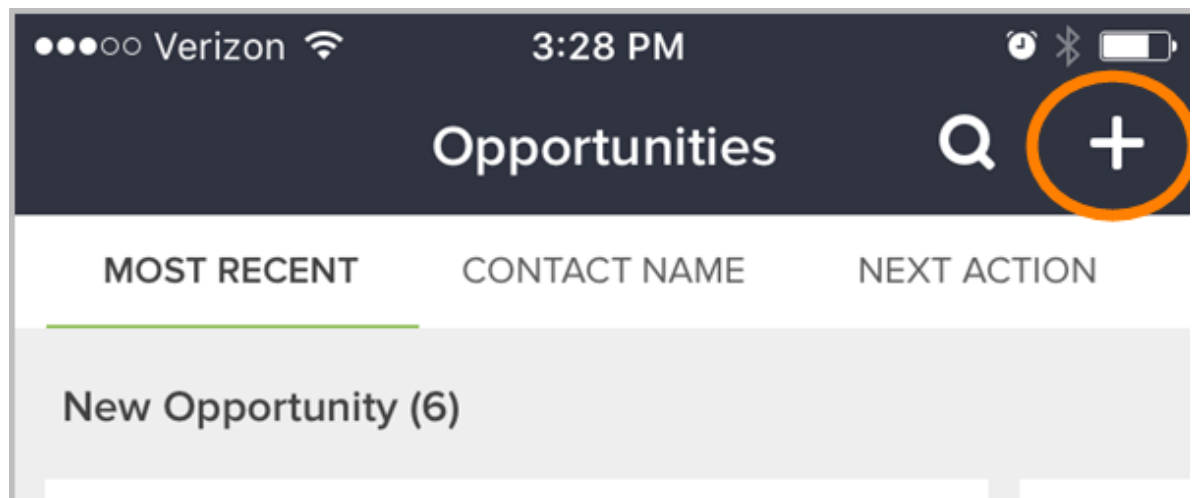
Settings

1. To view your opportunities, just tap **Opportunities** on your device as shown above. If you have opportunities, you'll see them listed here grouped by stage. You can scroll left and right within a stage to cycle through each opportunity in that stage. You can scroll up and down to view more stages.





2. To add an opportunity, tap the + button



3. Enter the required information: Title, Contact, and Stage

Verizon 3:38 PM

Cancel Add Opportunity Save

Opportunity Title (Required)

Projected Revenue Low

Projected Revenue High

Assign Contact (Required) >

Sales Stage and Steps
New Opportunity >

Next Follow-up Action Date












Next Follow-up Action Notes

4. Once saved, you'll see your list of opportunities grouped by stage. You can scroll left and right within a stage to cycle through each opportunity in that stage. You can scroll up and down to view more stages.

Verizon 3:28 PM

Opportunities Q +

MOST RECENT	CONTACT NAME	NEXT ACTION
New Opportunity (6)		

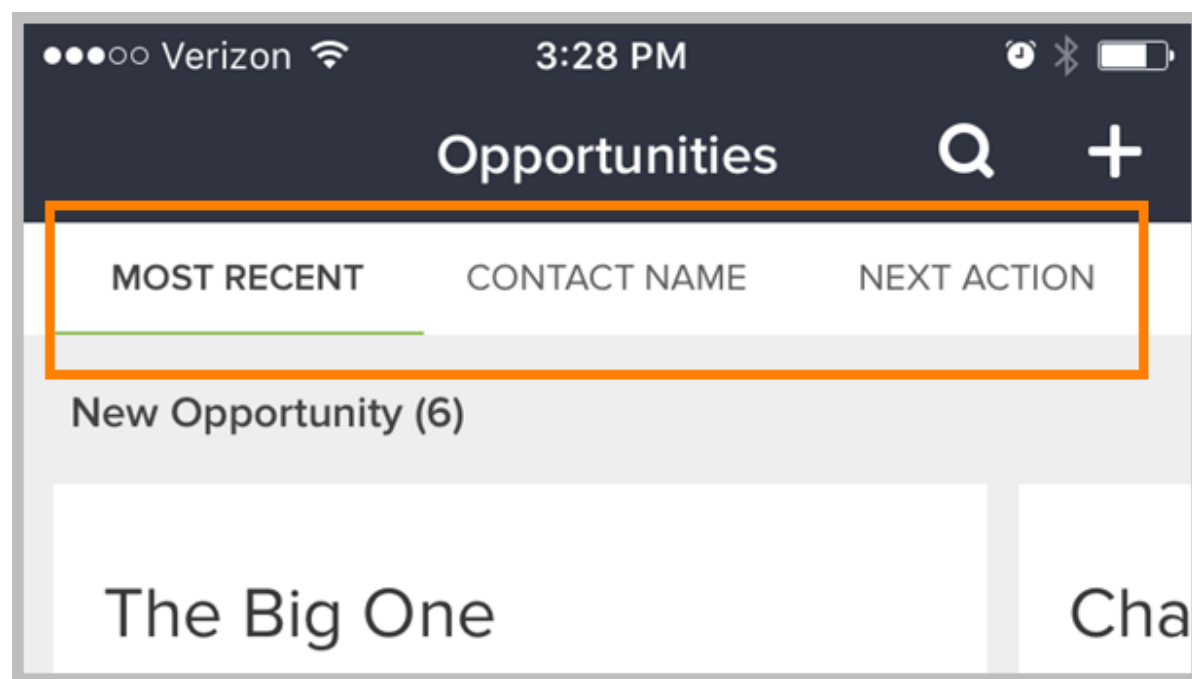
<h2>The Big One</h2> <p> \$50,000.00 - \$100,000.00</p> <hr/> <p>Christine Walker</p> <hr/> <p>Set up a dinner appointment and build the relationship.</p> <p> Next Action Date: Sep 23, 2016</p>	<h2>Cha</h2> <p> \$400</p> <hr/> <p>Ryan</p> <hr/> <p>Send t differen</p> <p> Nex</p>
<h3>Working (5)</h3>	
<h2>Evjen Family Fall Shoot</h2> <p> \$1,000.00 - \$3,000.00</p>	<h2>Falk</h2> <p> \$250</p>
<div>  Recents  Opportunities  Tasks  Orders  Settings </div>	

Pro-Tip! There are limits to the number of opportunities that are shown for each stage and the total number of stages:

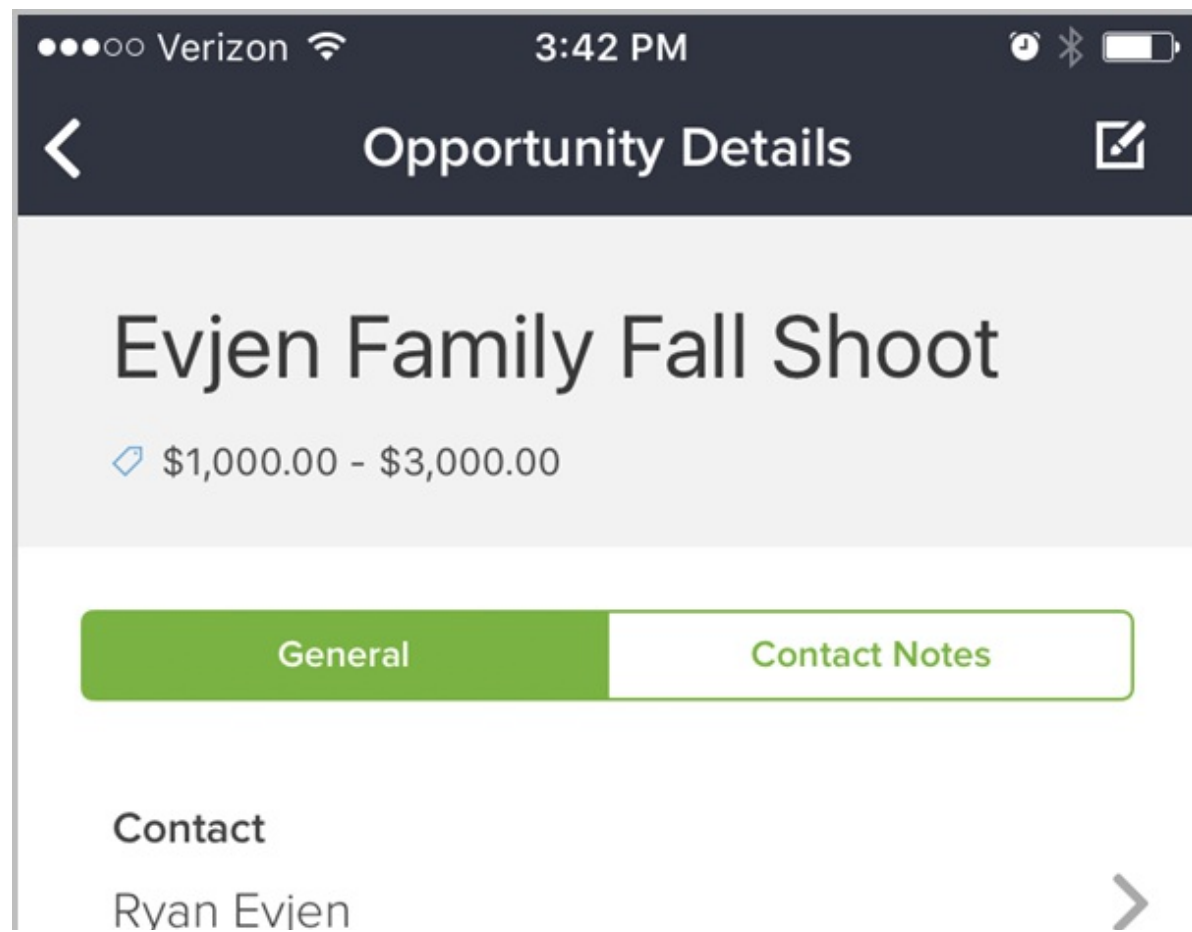
- A limit of 25 opportunities per stage
- A limit of 40 stages





5. You can sort your cards by tapping on one of the sorting options. Selecting one of the sorting options sorts the cards left to right within each stage: Most recent (most

recently used), Contact Name, Next action date (ascending - oldest first.)



6. Tapping anywhere on the opportunity card will take you to the details of that opportunity. From here, you can view opportunity details and communicate with the contact by tapping icons to call, text, email, or view the contact's address on your map.











Stage
 Working


Next Follow-up Action Date
 October 3, 2016


Next Follow-up Action Note
 They really want to take photos at the park by


 Recents


 Opportunities

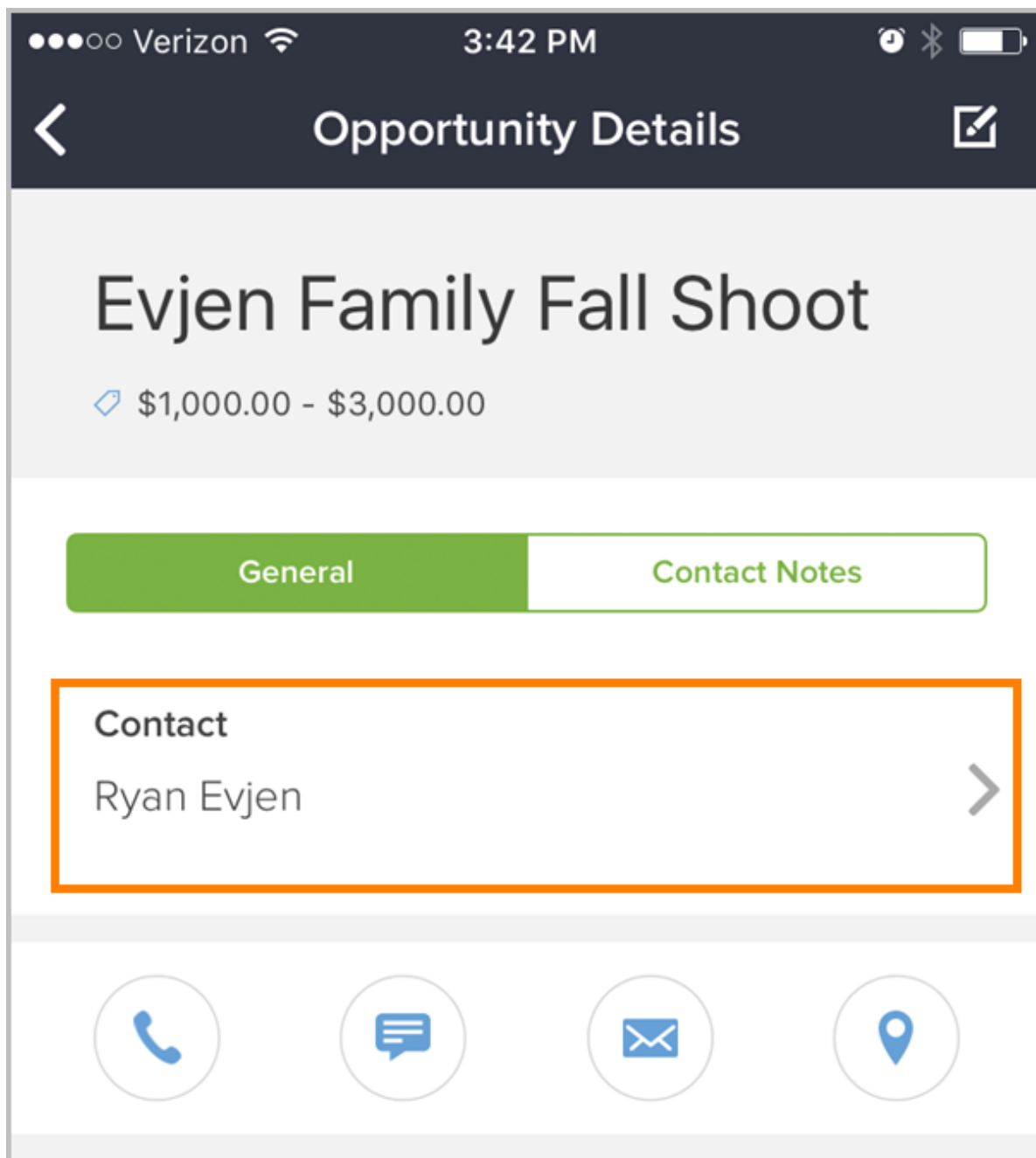

 Tasks


 Orders

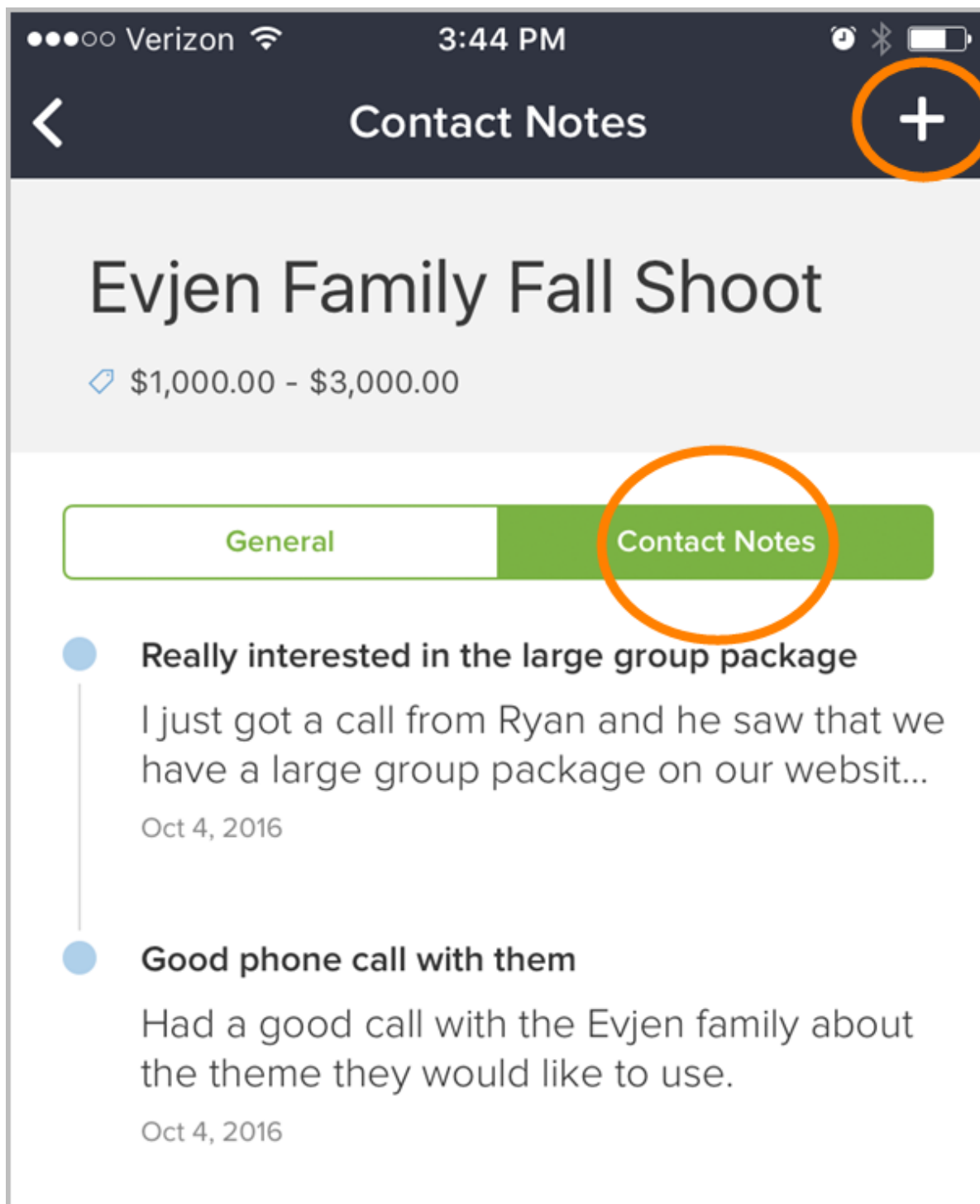

 Settings

Pro-Tip! If the phone number, email or street address is not found, contact action icons will not be available for that person.

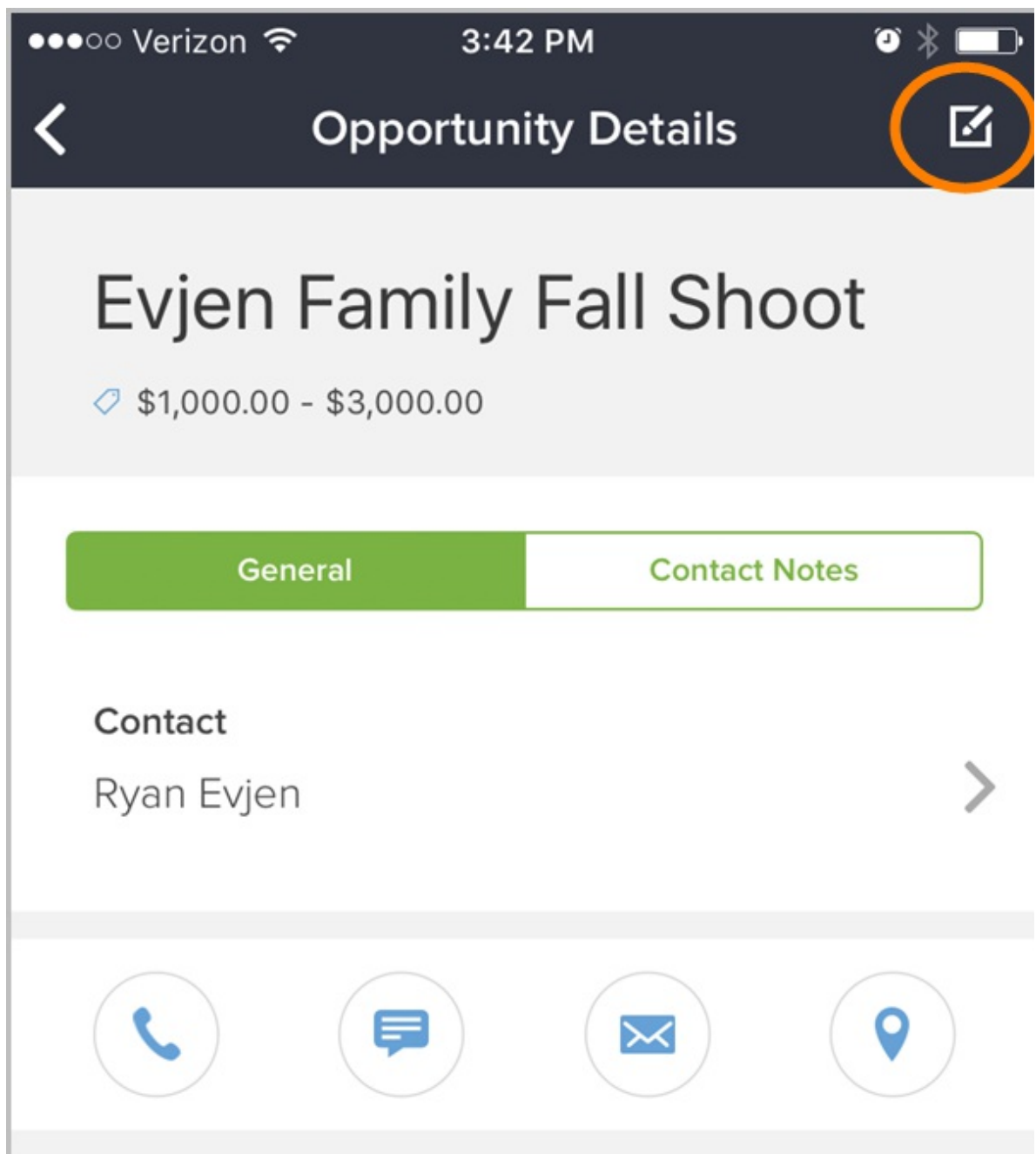
- You can tap on the contact's name to view the contact record



8. Tap the **Contact Notes** button to view and add notes to the contact record



9. To edit any of the opportunity information, click the **Edit** icon at the top right of the opportunity



10. Tap any of the fields, make your changes and tap **Save**. Tapping **Cancel** cancels any edits that you have made and takes you back to the opportunity detail screen


Verizon 3:46 PM

Cancel **Edit Opportunity** **Save**


Opportunity Title (Required)
Evjen Family Fall Shoot

Projected Revenue Low
\$1,000.00

Projected Revenue High
\$3,000.00

Assign Contact (Required)
 **Ryan Evjen** >

Sales Stage and Steps
Working >

 Next Follow-up Action Date
October 3, 2016 at 9:00 PM

Next Follow-up Action Notes
They really want to take photos at the park by their house. Give them a call and see when works best.

11. To change the stage of an opportunity, tap on the name of the stage

Verizon 3:46 PM

Cancel **Edit Opportunity** **Save**

Opportunity Title (Required)
Evjen Family Fall Shoot

Projected Revenue Low
\$1,000.00

Projected Revenue High

\$3,000.00



Assign Contact (Required)

Ryan Evjen



Sales Stage and Steps

Working



Next Follow-up Action Date

October 3, 2016 at 9:00 PM

Next Follow-up Action Notes

They really want to take photos at the park by their house. Give them a call and see when works best.

Opportunity Notes



Projected Close Date

12. Choose the name of the stage and tap **Done**. If a stage has required check boxes, they must be checked before the new stage is active.

●●●○ Verizon 3:46 PM [Alarm] [Bluetooth] [Battery]

Cancel Change Stage Done

Sales Stage and Steps

☐ New Opportunity

☒ Working

☒ Confirm Location (Required)

☐ Offer Package Upsell

☐ Send Reminder

☐ Closing

Important Note! A stage change is not complete until you tap Done.

13. To find an opportunity, go to your opportunity list and tap the **magnifying glass** icon. You can search by opportunity title name or contact name.


●●●○ Verizon 3:28 PM [Alarm] [Bluetooth] [Battery]

Opportunities [Magnifying Glass] +

MOST RECENT CONTACT NAME NEXT ACTION

New Opportunity (6)

The Big One

 \$50,000.00 - \$100,000.00

Christine Walker

Set up a dinner appointment and build the relationship.

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Working (5)

Evjen Family Fall Shoot

 \$1,000.00 - \$3,000.00

Falk

 \$250



Recents



Opportunities



Tasks



Orders



Settings