fibreCRM
HEART OF THE PRACTICE

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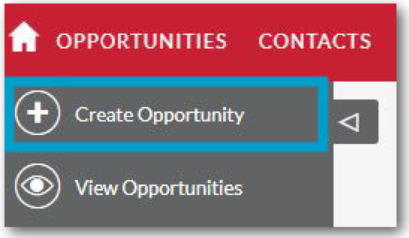
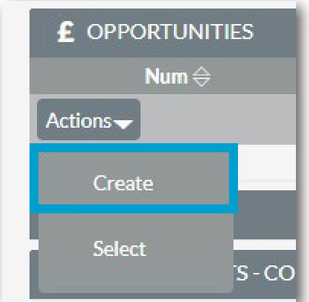
Creating an Opportunity

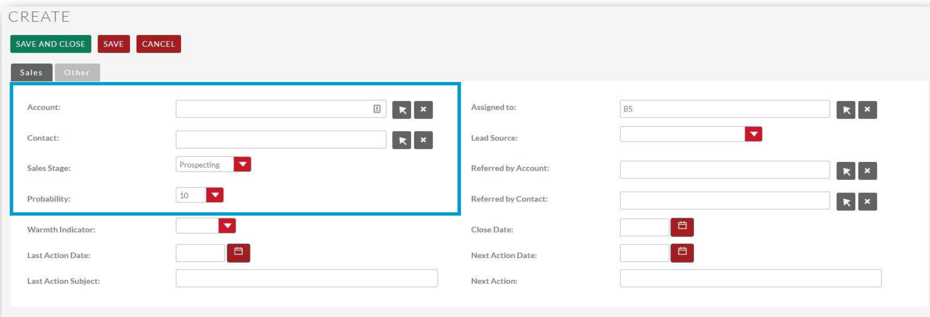
1. To view or create an Opportunity record, You can do so by selecting the **OPPORTUNITIES** module from the Navigation Menu and select the CREATE OPPORTUNITY button.



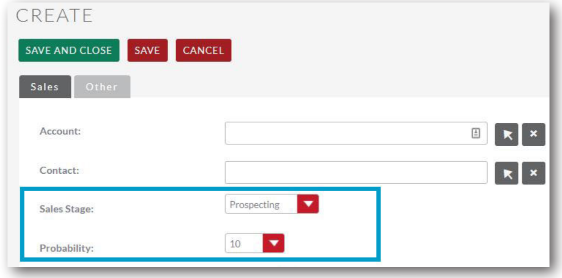
2. Or by navigating to a **PERSON** or **ORGANISATION** record and in the **OPPORTUNITIES** subpanel select the **CREATE** option in the **ACTIONS** buttton



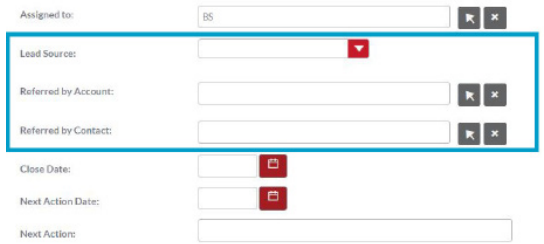
3. The **SALES** tab is where you will enter information about the Opportunity



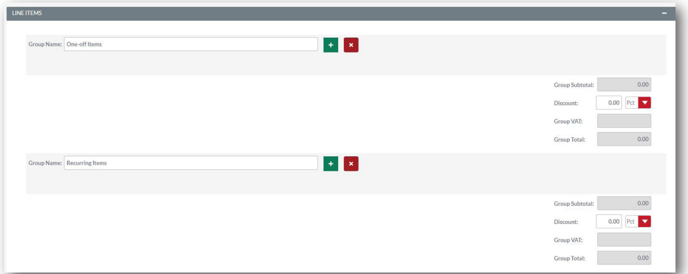
4. You will be able to manage the **SALES STAGE** of the Opportunity. When you select a Sales Stage in the Opportunity record, you can also manually set the probability of success in the **PROBABILITY** field.



5. If your **LEAD SOURCE** is a referrer then leave the box blank and use the **REFERRED BY CONTACT or ACCOUNT MENU.** If the Opportunity has been created by converting a lead then the lead source will be automatically filled.



6. **LINE ITEMS** is the place to add the various one-off or recurring services for that opportunity. You can enter a unit price, as well as the sales stage for each item.



7. Once you have entered all the information into the Opportunity that you require, click **SAVE & CLOSE.**

8. To edit an Opportunity record,navigate back to the Opportunities Module and use the **SEARCH FILTER** in the list view. Once you have located the record you wish to edit. Select the **EDIT** option from the **ACTIONS MENU.**