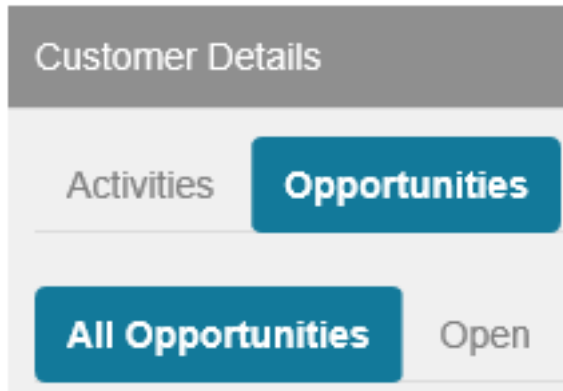


ERM User Manual

What does INACTIVE mean in Opportunity Page?

INACTIVE is used by the team supervisors or Event Managers when an opportunity has been left untouched for quite awhile, but is still open to the possibility of securing or closing the deal and booking the event.

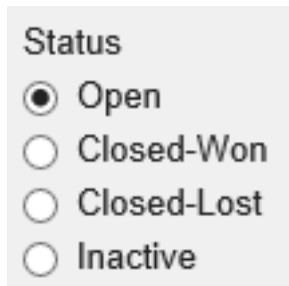
To close an opportunity as INACTIVE. When the customer calls back or you do a follow up call for this customer or a customer who has an opportunity schedule, all you need to do is click on the Opportunity Tab on the Customer Details Page.



Click on the Opportunity Name you wish to close as **INACTIVE**. This will open up the Opportunity in a new page.

TO CLOSE THE OPPORTUNITY AS **INACTIVE**:

1. Check and make sure you have the correct opportunity open.
2. Click on **INACTIVE**.



3. Click on Save Changes.

Attached files:

Unique solution ID: #1174

Author: Event Managers

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