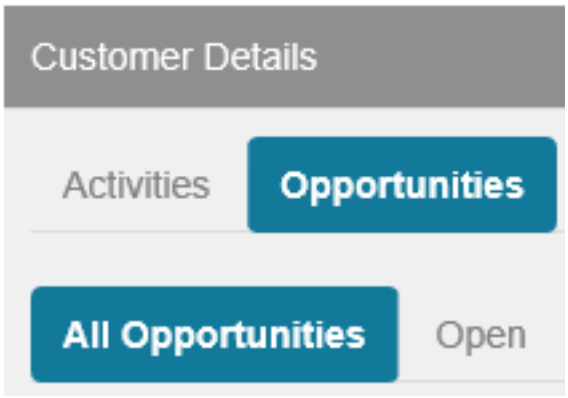
Opportunities

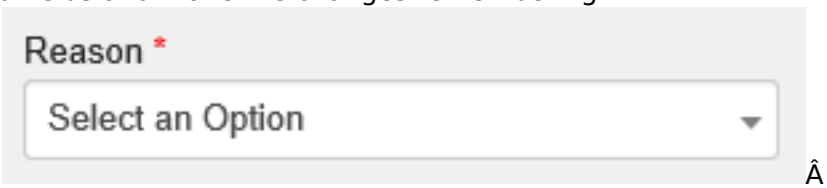
How do I edit an Opportunity?

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.Â



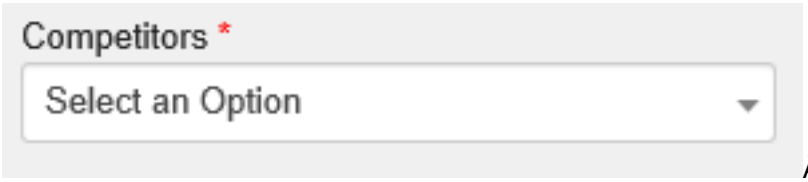
Click on the Opportunity Name.Â This will open up the Opportunity in a new page.Â

TO EDIT THE OPPORTUNITY:

1. Click on any of the related fields and make the changes remembering ...
    1. **DO NOT TOUCH** 

Â field.
    For information and instruction on theÂ **Reason**s field box click here to read more.

    Â

    2. **DO NOT TOUCH** 

Â field.
    For more information and instruction on the **Competitors** field box click here to read more.

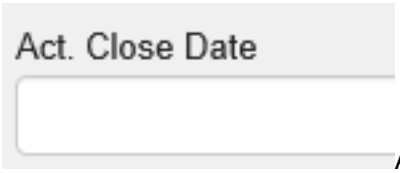
    Â

    3. **DO NOT TOUCH** 

Â field as this.Â
    This is the date (today) of when you opened the New Opportunity.

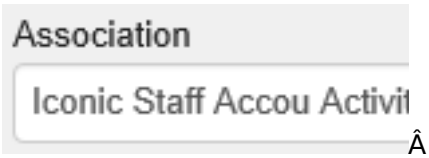
    Â

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URL: https://staff.iconic.productions/KB/content/0cat=49/178/en/how-do-i-edit-an-opportunity.html

4. **DO NOT TOUCH** 

Â field.
This field is the actual automated date created by the system when the opportunity has been closed either as a WON or LOST.

Â

5. **DO NOT TOUCH** 

Â field.
The field associates the opportunity with the customer name, company and account page.Â It should never be changed.

6. Click on **SAVE CHANGES.**

Attached files:

Unique solution ID: #1177
Author: Event Managers
Last update: 03-Feb-2016 01:38

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