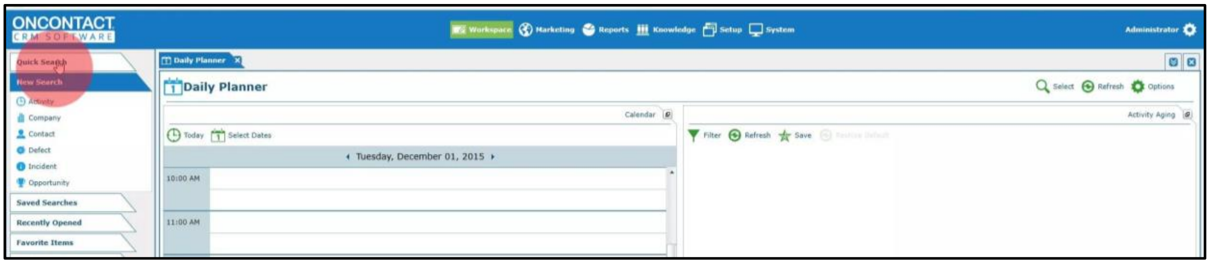
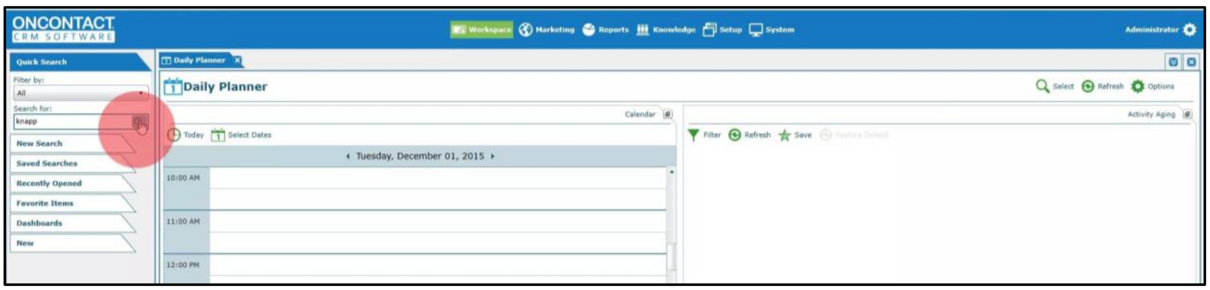
12/1/2015

ADD A NEW OPPORTUNITY

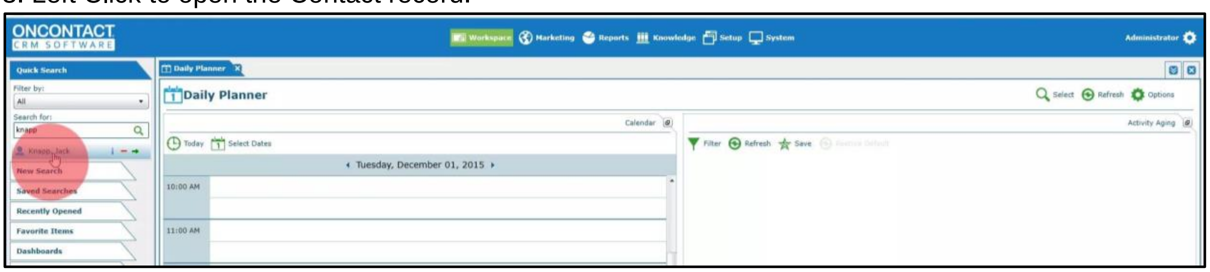
1. It's easiest and most effective to start by opening the Contact record for this sales opportunity.



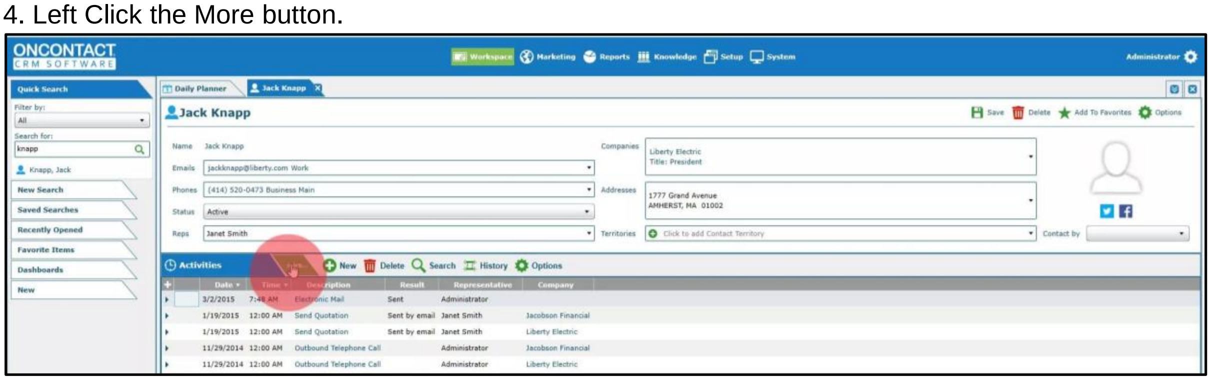
2. Search for the Contact.



3. Left Click to open the Contact record.

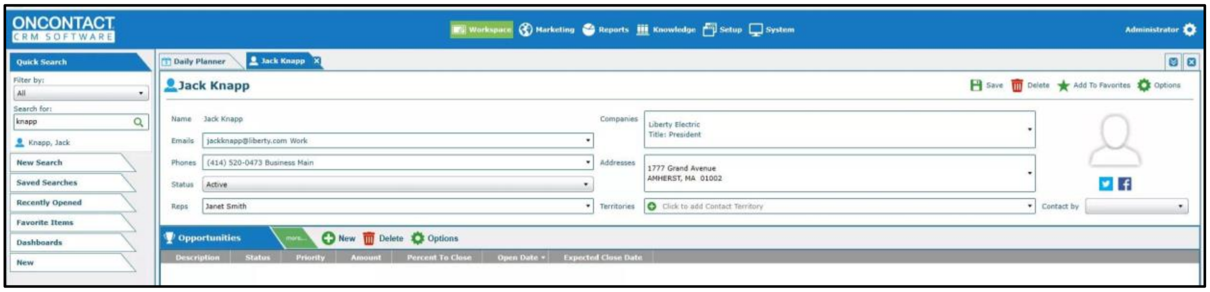


4. Left Click the More button.

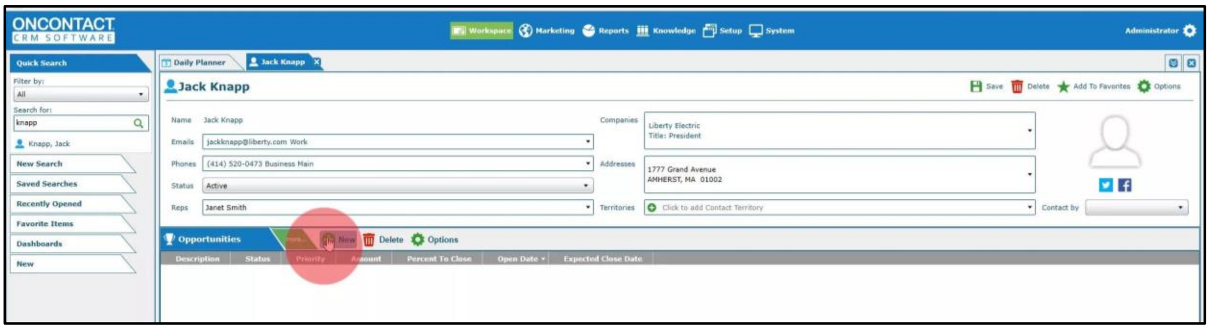


ADD A NEW OPPORTUNITY

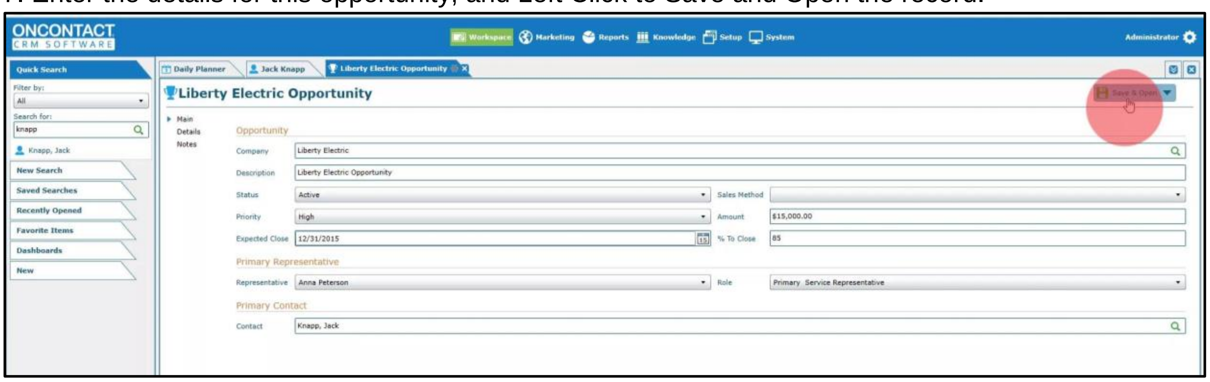
5. Left Click to select the Opportunity tab.



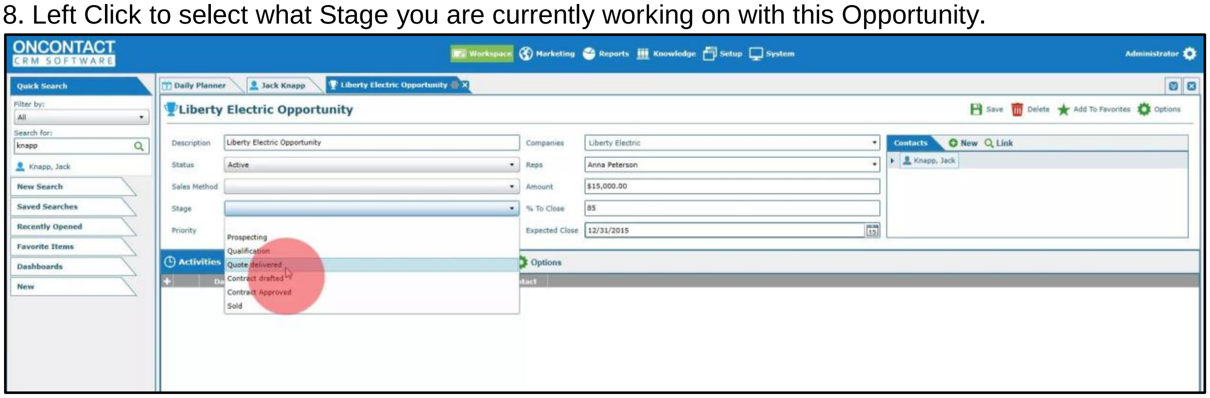
6. Left Click New.



7. Enter the details for this opportunity, and Left Click to Save and Open the record.

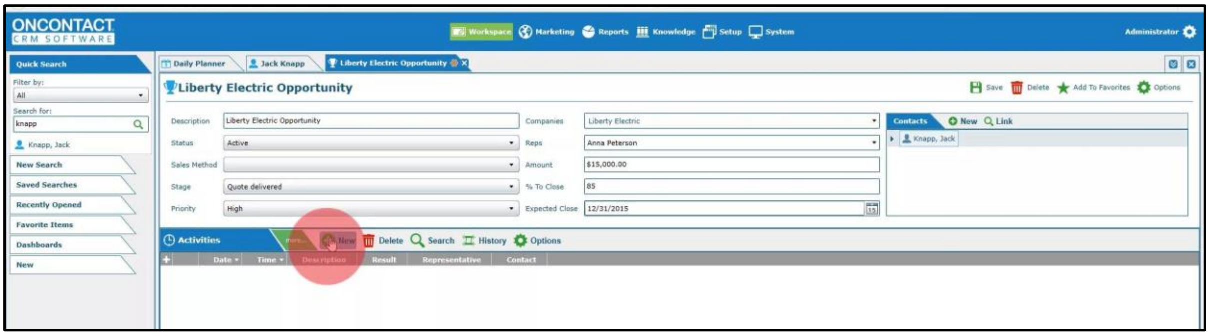


8. Left Click to select what Stage you are currently working on with this Opportunity.

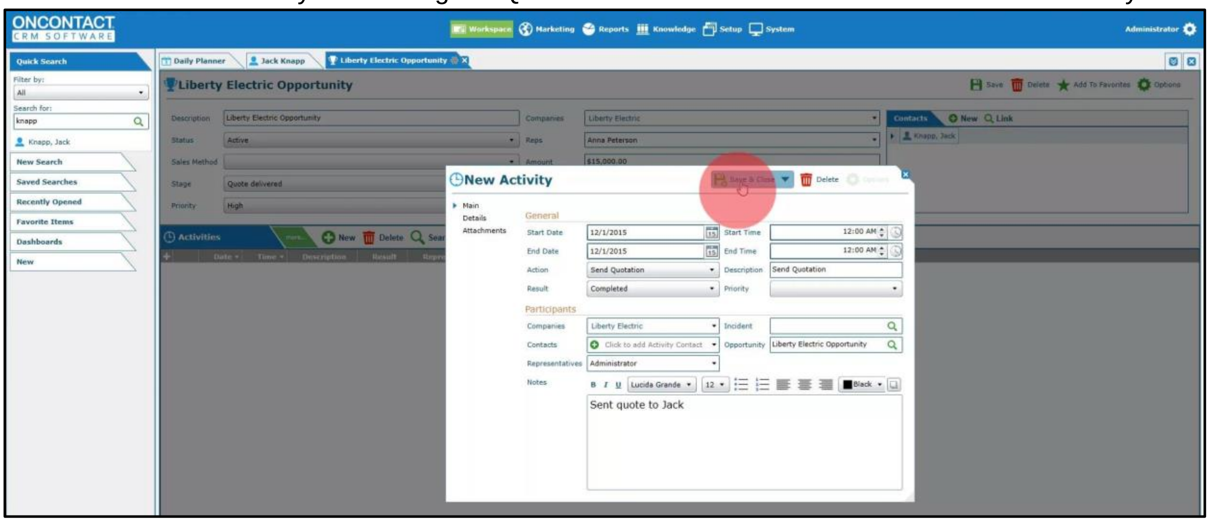


ADD A NEW OPPORTUNITY

9. Left Click New to add any related Activities.



10. We entered an activity for sending the Quote to Jack. Left Click to save and close the activity.



11. We also added an Activity to follow up with Jack in a few days to make sure we stay on top of this Opportunity. Click to save the Opportunity record.