

# CITK

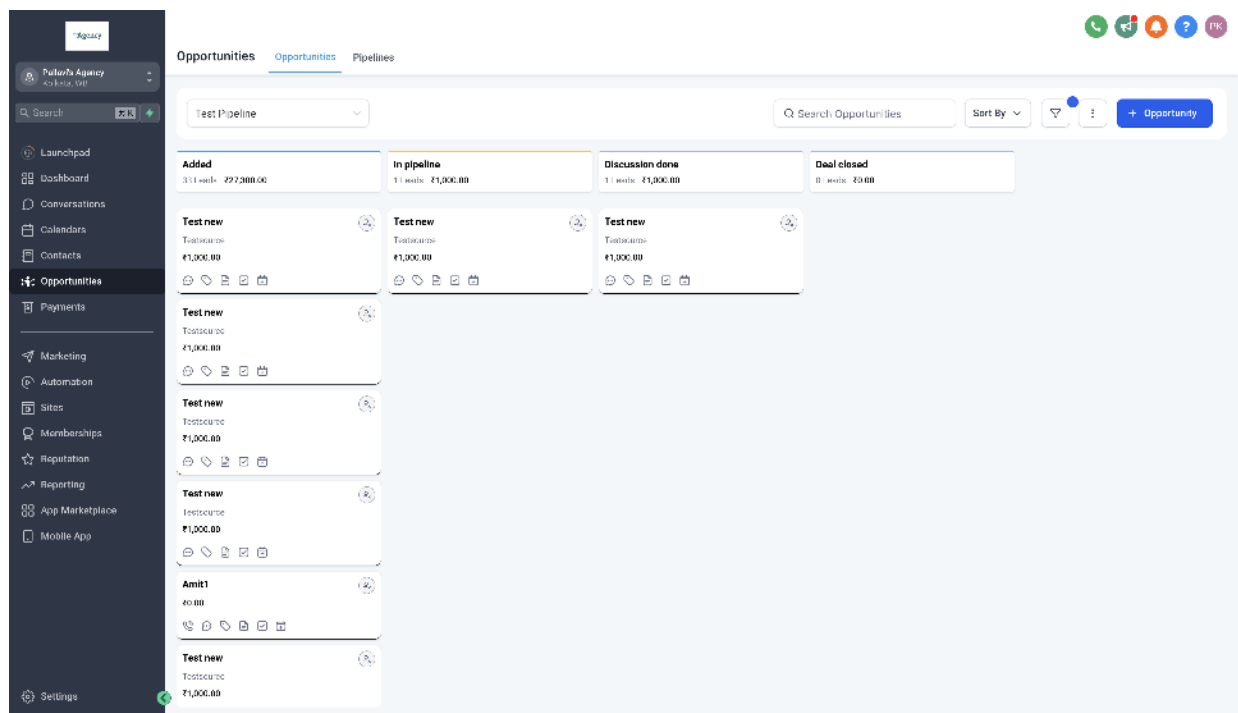
## Step-by-Step Guide: Creating Opportunities



# Step-by-Step Guide: Creating Opportunities

Opportunities are pivotal in managing potential sales within GoHighLevel. This step-by-step guide will walk you through the process of creating opportunities, enabling you to efficiently track contacts through the sales pipeline.

## Step 1: Accessing the Opportunities Section



- Log in to your GoHighLevel account.
- Go to your sub Account
- Navigate to the "Opportunities" section from the sidebar menu.

## Step 2: Creating a New Opportunity

## Step-by-Step Guide: Creating Opportunities

- Once you're in the Opportunities section, click on the "+ Opportunity" button on the top right.
- Fill in the relevant details for the opportunity, such as the contact name / information, pipeline details and opportunity value.
- Optionally, you can add other values to this opportunity or make the opportunity owner a specific user or team member responsible for managing it.
- Click on "Create" and the opportunity will be created and will start showing in the Opportunities dashboard.

### Add new opportunity

Create new opportunity by filling in details and selecting a contact

Opportunity Details

Contact details

Contact Name \*

Email

Phone

Opportunity details

Opportunity Name \*

Pipeline

Stage

Status

Opportunity Value

Owner

Followers

Business Name

Opportunity Source

New

You can now have different owner for contact and opportunity.

[Go to labs](#)

[Add/Manage Fields](#)

Cancel

Create

## Step 3: Adding Details and Notes

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- You can click on any opportunity to open its edit page.
- In the opportunity details page, you'll find fields to add additional information about the opportunity.
- Include any relevant notes or details about the contact's needs, preferences, or interactions.
- These notes and tasks will also start reflecting in the contact's information.

Edit "Test new" ×

Add and edit opportunity details, tasks, notes and appointments.

Opportunity Details

Some other info

test

**Book/Update appointment**

Tasks

Notes

Book/Update Appointment

Calendar \*  

Select calendar

Meeting Location ☺  

Meeting Location

Appointment Title ☺  

Appointment Title

New

You can now have different owner for contact and opportunity.

[Go to labs](#)

⚙️ Add/Manage Fields

Created By: Workflow

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Cancel

Book Appointment