

# CTTK

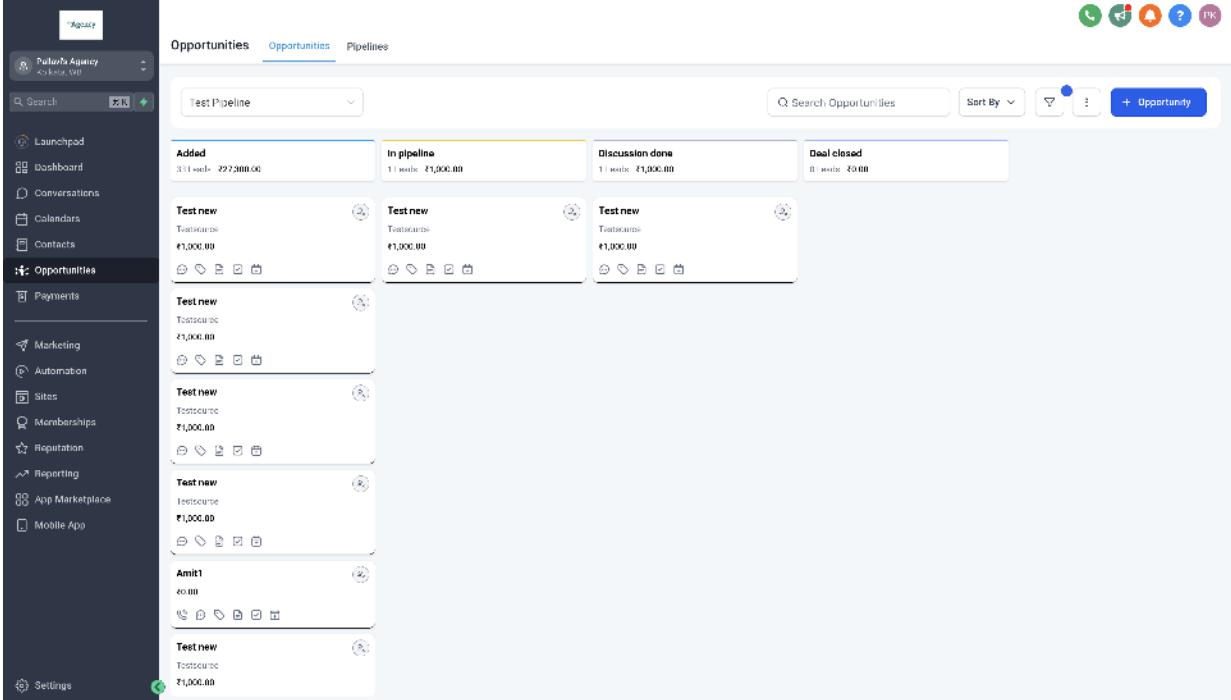
## Step-by-Step Guide: Creating Opportunities



# 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



The screenshot shows the GoHighLevel platform interface. The left sidebar is open, showing various sections like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities (which is selected and highlighted in blue), Payments, Marketing, Automation, Sites, Memberships, Reputation, Reporting, App Marketplace, and Mobile App. The main content area is titled 'Opportunities' and shows a grid of opportunities. The grid has four columns: 'Added', 'In pipeline', 'Discussion done', and 'Deal closed'. Each column contains several opportunity cards, each with a title like 'Test new', a timestamp, and a value like '\$1,000.00'. The 'In pipeline' column has one card with a value of '\$1,000.00'. The 'Discussion done' and 'Deal closed' columns each have one card with a value of '\$1,000.00'. The 'Opportunities' tab is selected, and there are other tabs for 'Pipelines' and a search bar at the top.

- 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

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- 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	Opportunity details
Contact Name *	Opportunity Name *
Select Contact	Enter opportunity name
Phone	Business Name
Enter Phone	Enter Business Name
Pipeline	Stage
Test Pipeline	Added
Status	Opportunity Value
Open	₹ 0
Owner	Followers
Unassigned	Add Followers
Business Name	Opportunity Source
Enter Business Name	Enter 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

Created on: Feb 12th 2024, 1:02pm

Cancel

**Book Appointment**

