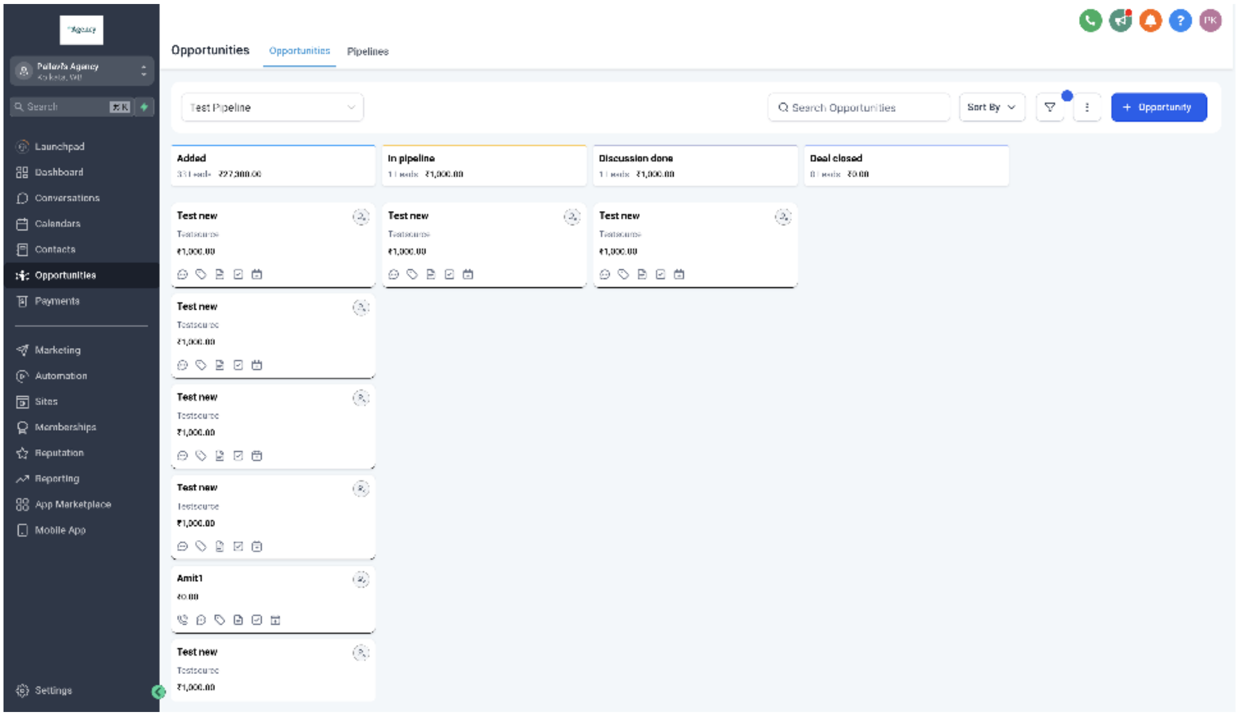
CITK

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.

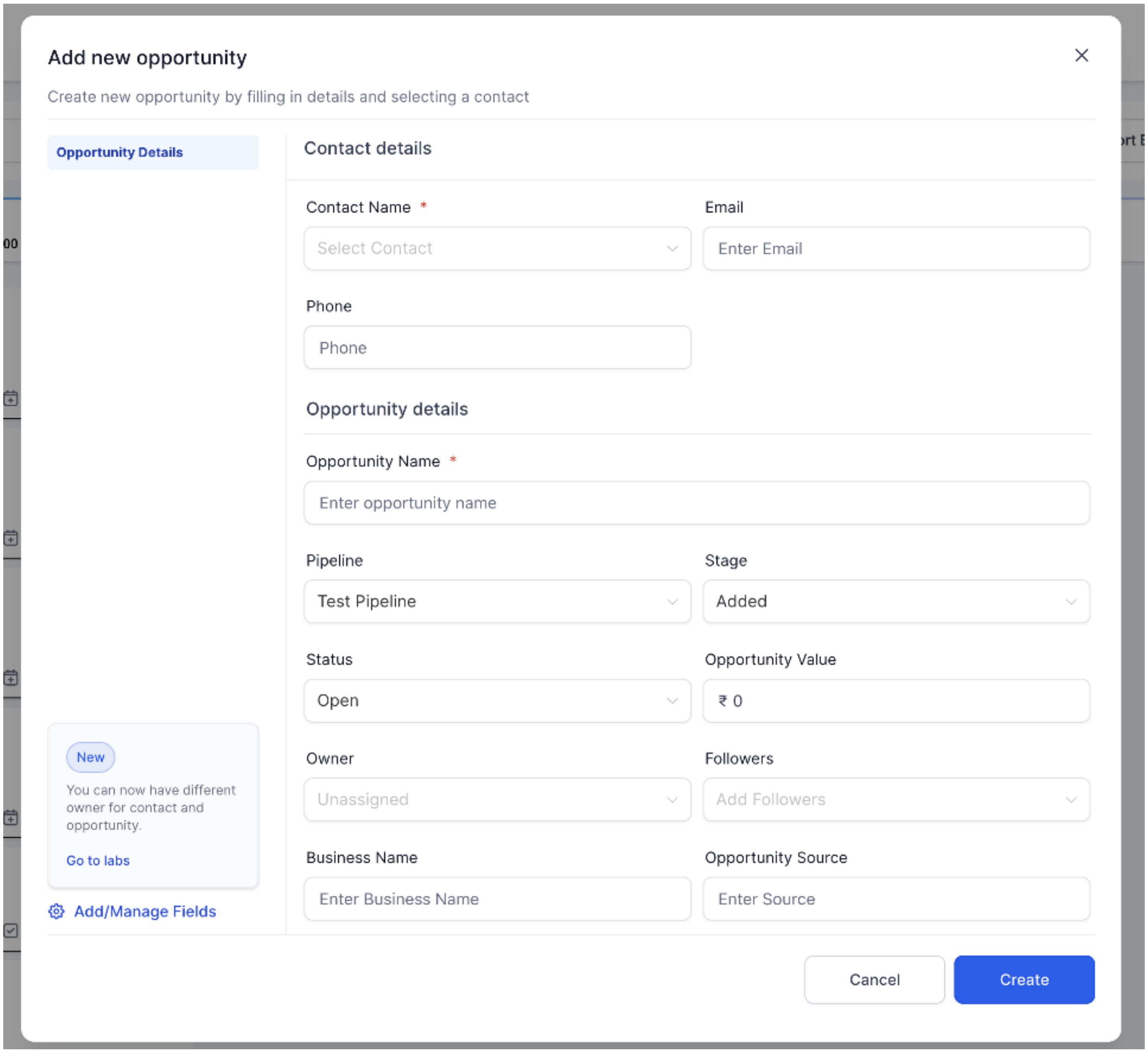
Step 1: Accessing the Opportunities Section



- 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

- 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.



Step 3: Adding Details and Notes

- 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.