

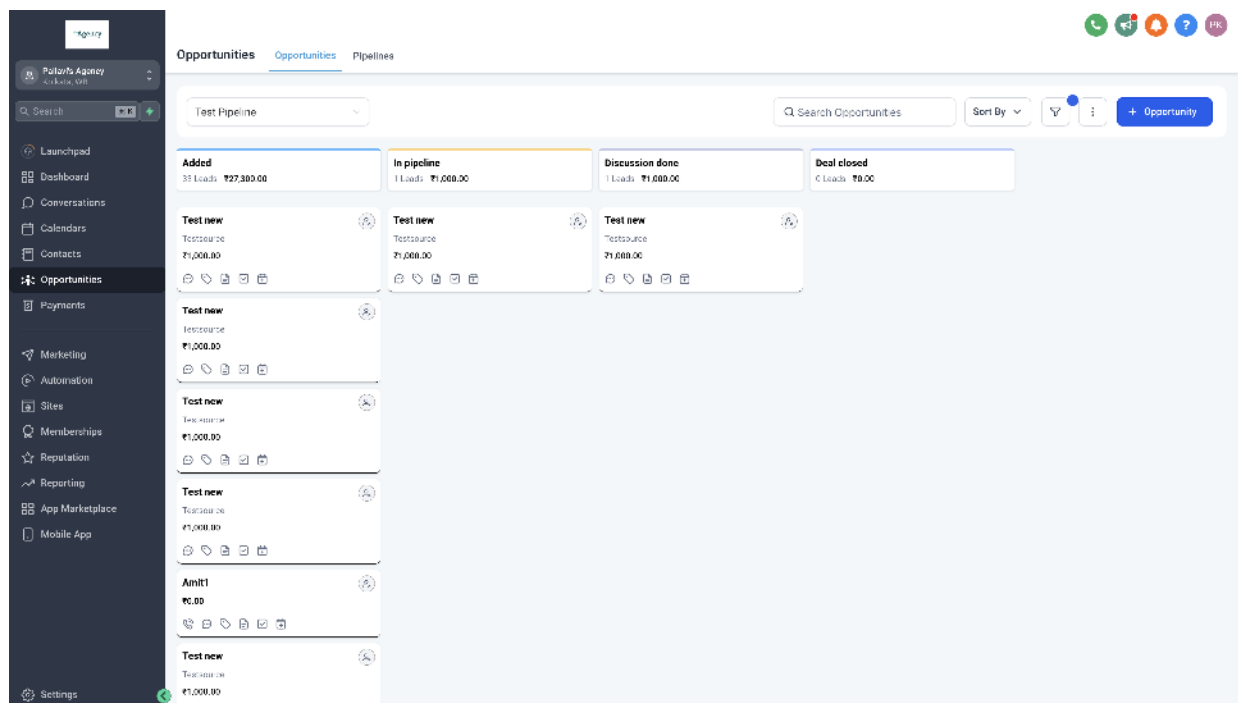
# CITK

Editing Opportunities



GoHighLevel offers robust tools for managing opportunities, enabling users to efficiently update information to keep pace with evolving sales processes. In this comprehensive guide, we'll explore the step-by-step process of editing opportunities in GoHighLevel, empowering you to streamline your sales workflow.

## Step 1: Accessing the Opportunities Section



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

### Step 2: Locating the Opportunity to Edit

- Once you're in the Opportunities section, locate the opportunity you wish to edit.
- You can use search filters or browse through the list of opportunities to find the specific one you need to update.
- Click on the name or title of the opportunity to open its details page.

### Step 3: Opening the Opportunity Details Page

- In the opportunity details page, you'll find fields containing information about the opportunity.
- Update any relevant details such as the contact's name, contact information, opportunity value, and opportunity source.
- You can also modify pipeline stages, owners, tags, or any other custom fields associated with the opportunity.

## Editing Opportunities

Edit "Test new" ×

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

Opportunity Details

Some other info

test

Book/Update appointment

Tasks


Notes

New

You can now have different owner for contact and opportunity.

[Go to labs](#)

[Add/Manage Fields](#)

Contact details 

☐ Hide Empty Fields

Contact Name \*

nilasish2

Email

Enter Email

Phone

Phone

Opportunity details

Opportunity Name \*

Test new

Pipeline

Test Pipeline

Stage

In pipeline

Status

Open

Opportunity Value

₹ 1000

Owner

Unassigned

Followers

Add Followers

Business Name


Enter Business Name

Opportunity Source

Testsource

Created By: [Workflow](#)

Created on: Feb 9th 2024, 4:29pm



Cancel

Update

## Step 4: Adding Notes and Attachments

## Editing Opportunities

Edit "Test new" ✕

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

Opportunity Details

Some other info

test

Book/Update appointment

Tasks

**Notes**

New

You can now have different owner for contact and opportunity.

[Go to labs](#)

[Add/Manage Fields](#)

Created By: Workflow

Created on: Feb 9th 2024, 4:29pm

Add Notes

New Note \*

Enter Note

Cancel

Add Note

- If necessary, add new notes or additional information about the opportunity by clicking on the "Notes" option in the left sidebar.
- All notes added here will also reflect in the corresponding contact's notes also.

## Step 5: Setting Tasks and Reminders

## Editing Opportunities

Edit "Test new"

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

Opportunity Details

Some other info

test

Book/Update appointment

Tasks

Notes

← Add Task

Title \*

Task Title

Description

Task Description

Assign To

Not assigned

Due Date

2024-02-16 00:44:04

New

You can now have different owner for contact and opportunity.

Go to labs

Add/Manage Fields

Created By: Workflow

Created on: Jan 18th 2024, 8:00pm

Cancel

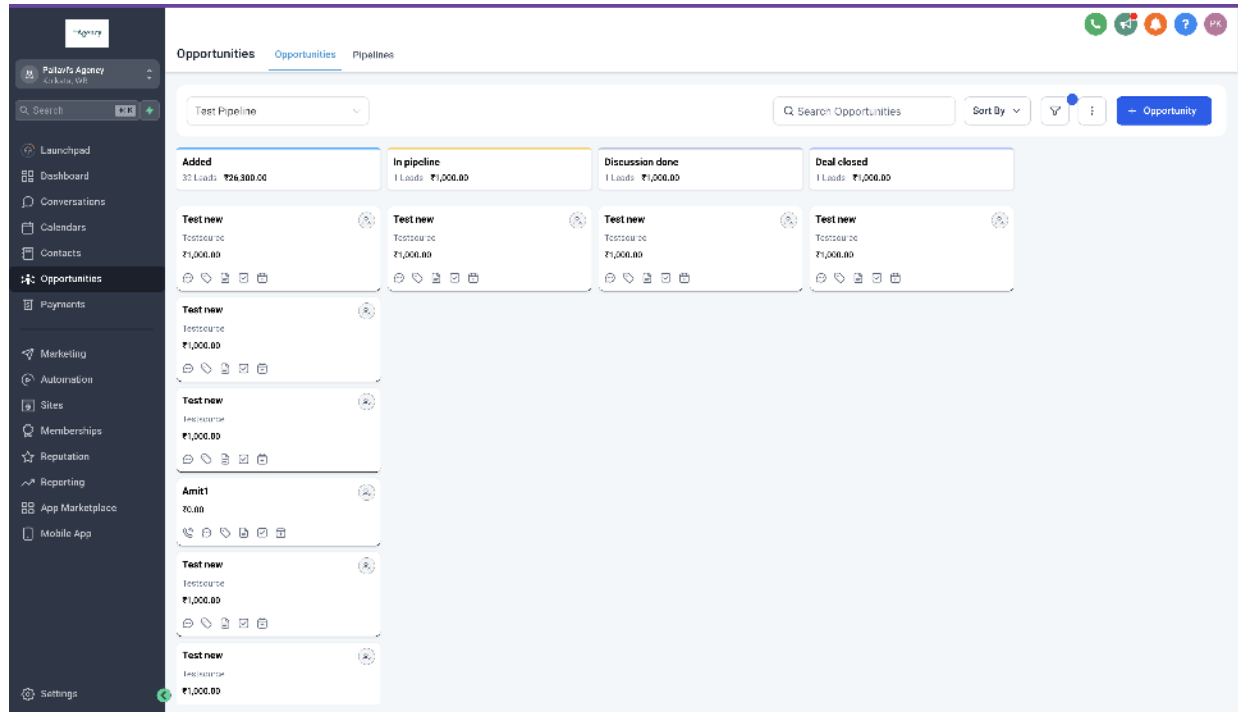
Add Task

- If there are specific tasks or follow-up actions associated with the opportunity, set tasks and reminders as needed by opening it from the sidebar.
- Assign tasks to yourself or team members, specifying due dates and priority levels.
- Similarly, you can also add appointments in the same way.
- Tasks and appointments added this way will also reflect on the contact's end.

### Step 6: Managing Pipeline Stages

- Adjust the pipeline stage of the opportunity to reflect its current status in the sales process.
- Move the opportunity through different stages as it progresses towards closure, updating its status accordingly.

# Editing Opportunities



## Step 7: Managing Opportunity Status

- Drag and drop the opportunity to any status as seen in the bottom to update it's status.
- Possible statuses for an opportunity are "Open", "Won", "Lost" and "Abandoned". Default status for a new opportunity is "Open".
- Marking an opportunity lost also allows you to add a lost reason for the same.

