

CITK

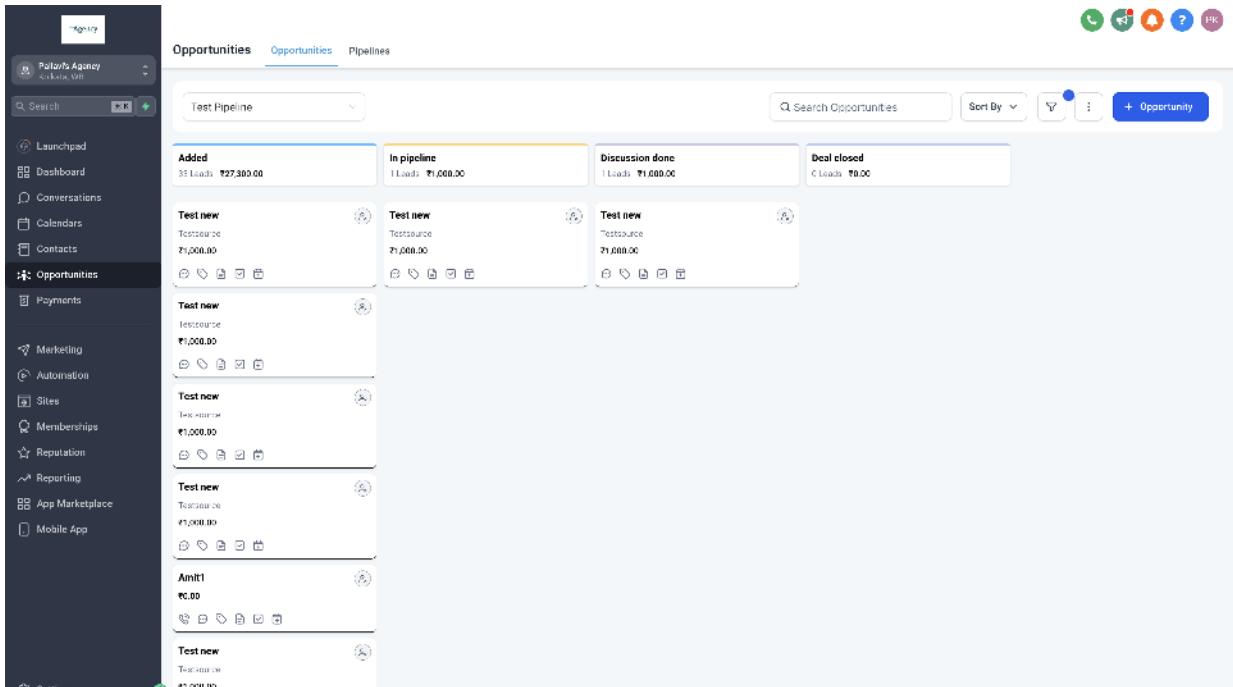
Editing Opportunities



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



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 pipeline view for 'Test Pipeline'. The pipeline is divided into four stages: 'Added' (35 Leads, \$27,300.00), 'In pipeline' (1 Leads, \$1,000.00), 'Discussion done' (1 Leads, \$1,000.00), and 'Deal closed' (0 Leads, \$0.00). Each stage contains a list of deals with details like 'Test new', 'Testsource', and a value of '\$1,000.00'. The top right of the main area has a search bar, a 'Sort By' dropdown, and a 'New Opportunity' button. The top right corner of the screen also has a set of small, colorful icons.

- 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.

Hide Empty Fields

Opportunity Details

Some other info
test

Book/Update appointment

Tasks

Notes

Contact details

Contact Name * nilashish2

Email Enter Email

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

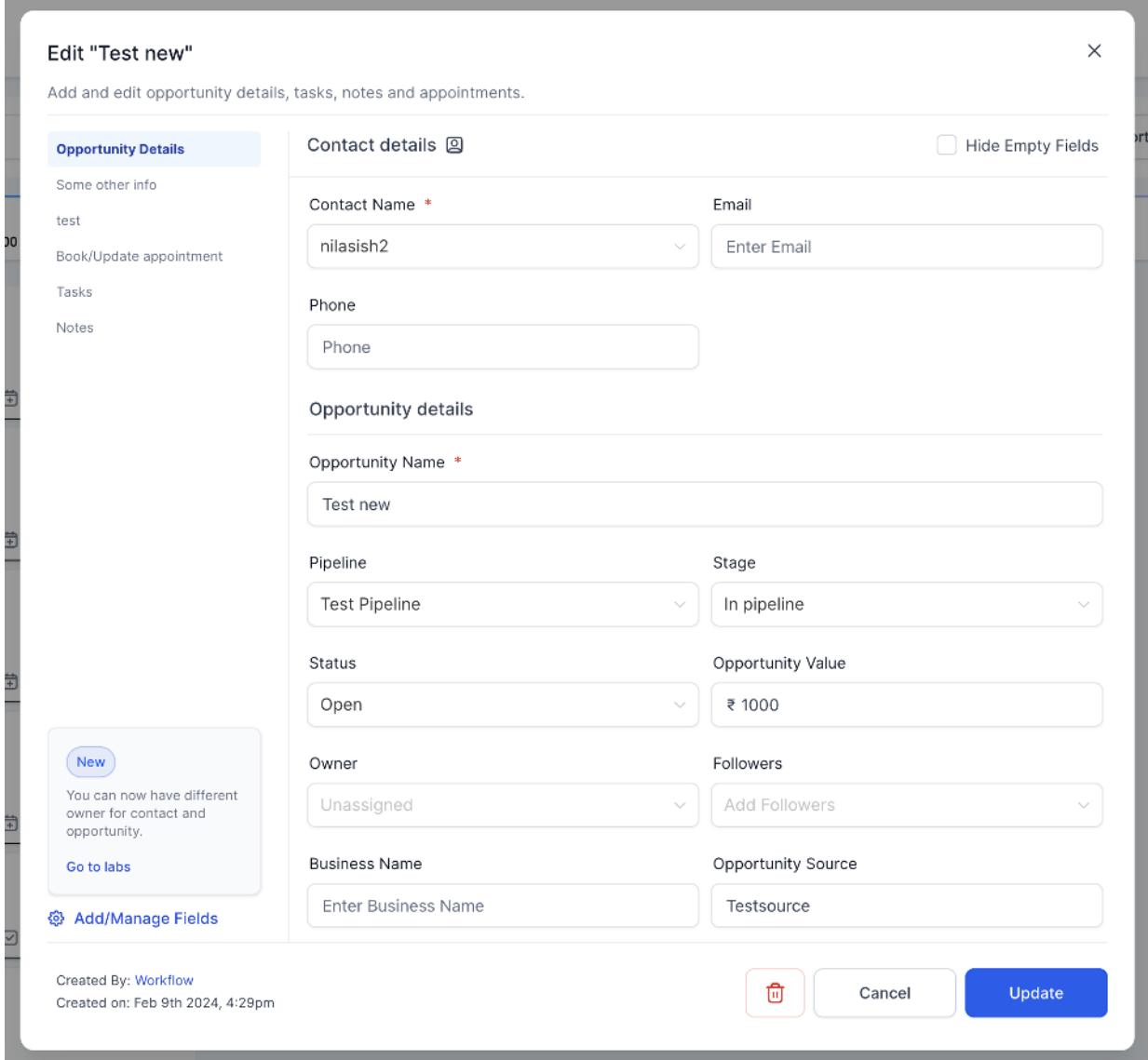
New
You can now have different owner for contact and opportunity.

Go to labs

Add/Manage Fields

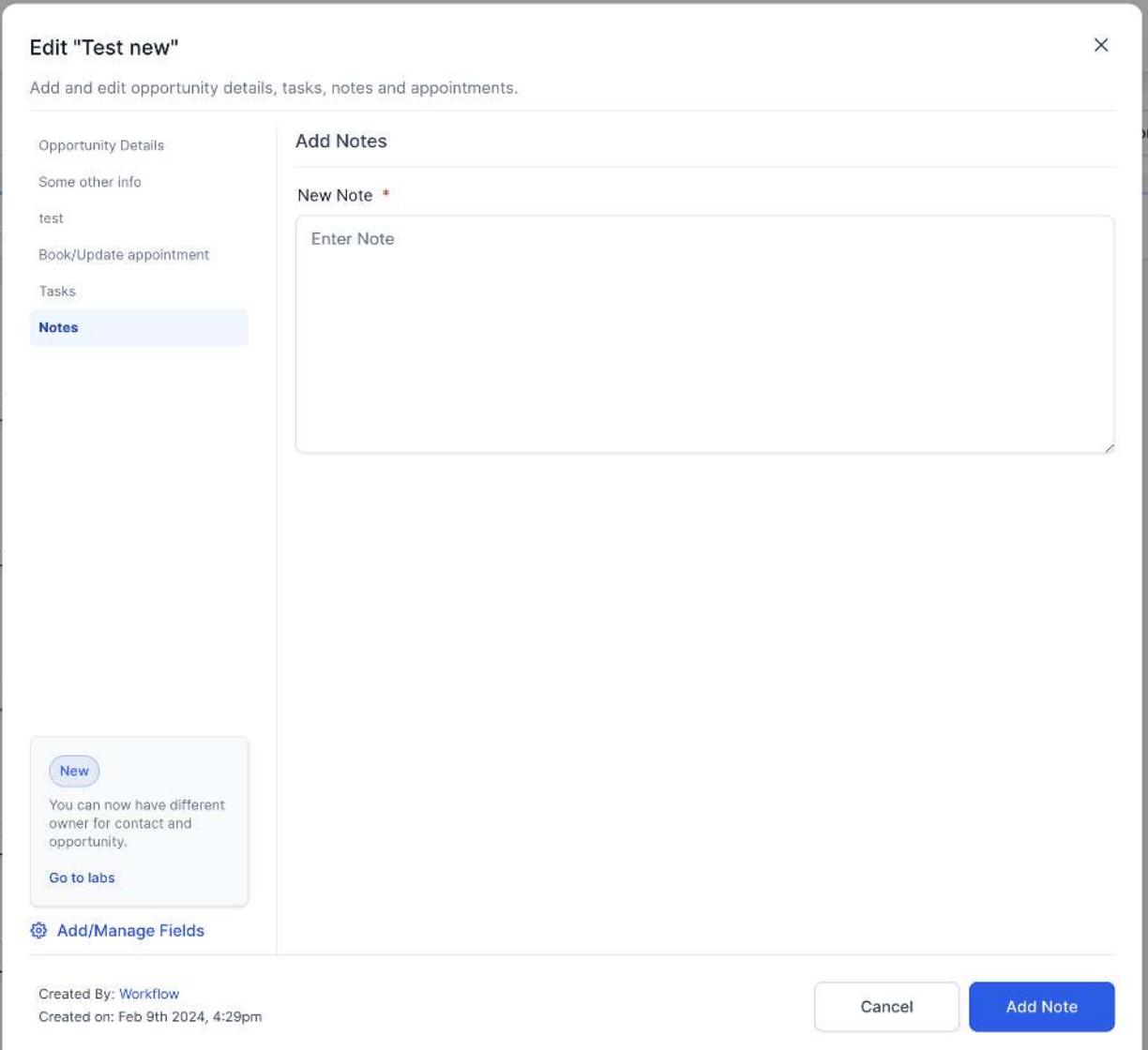
Created By: Workflow
Created on: Feb 9th 2024, 4:29pm

Cancel Update



Step 4: Adding Notes and Attachments

Editing Opportunities



The screenshot shows the 'Edit "Test new"' opportunity page. On the left, a sidebar lists 'Opportunity Details' (Some other info: test), 'Book/Update appointment', 'Tasks', and 'Notes' (which is selected and highlighted in blue). Below this is a 'New' button and a note: 'You can now have different owner for contact and opportunity.' There is also a 'Go to labs' button and an 'Add/Manage Fields' link. At the bottom of the sidebar, it says 'Created By: Workflow' and 'Created on: Feb 9th 2024, 4:29pm'. On the right, a modal window titled 'Add Notes' is open, showing a 'New Note *' field and a 'Enter Note' text area. At the bottom right of the modal are 'Cancel' and 'Add Note' buttons.

- 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

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

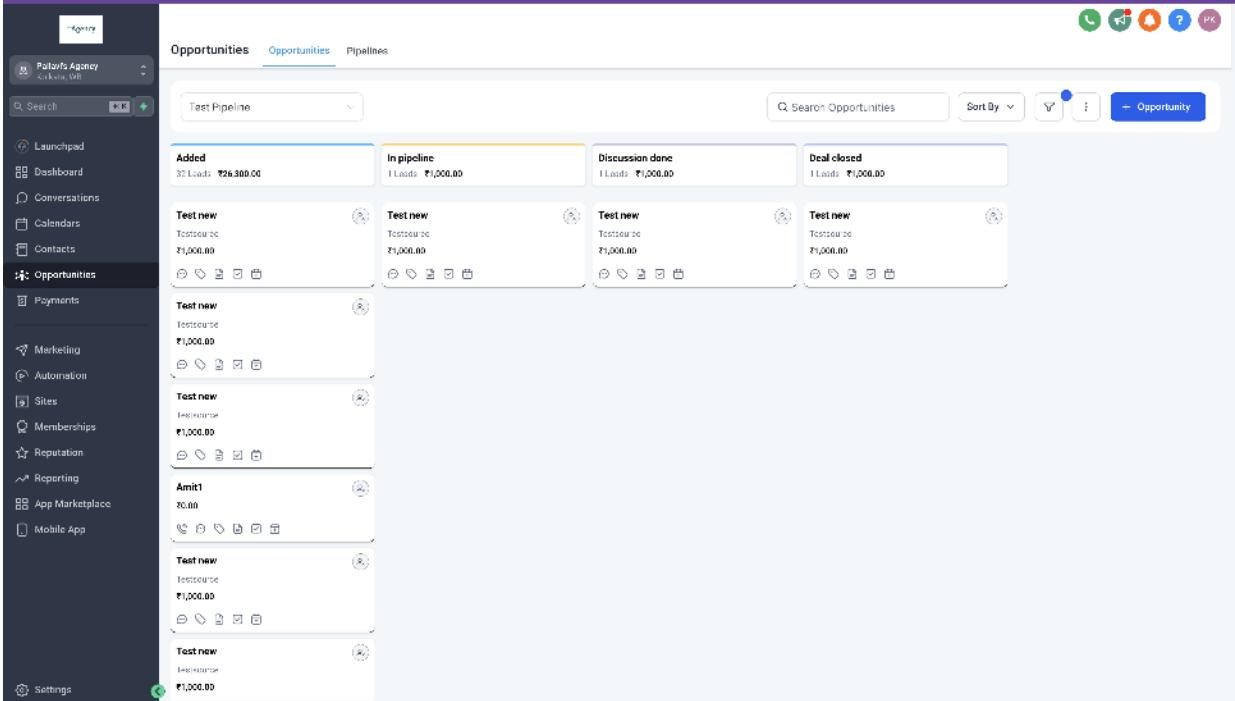
Add Task

- 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.

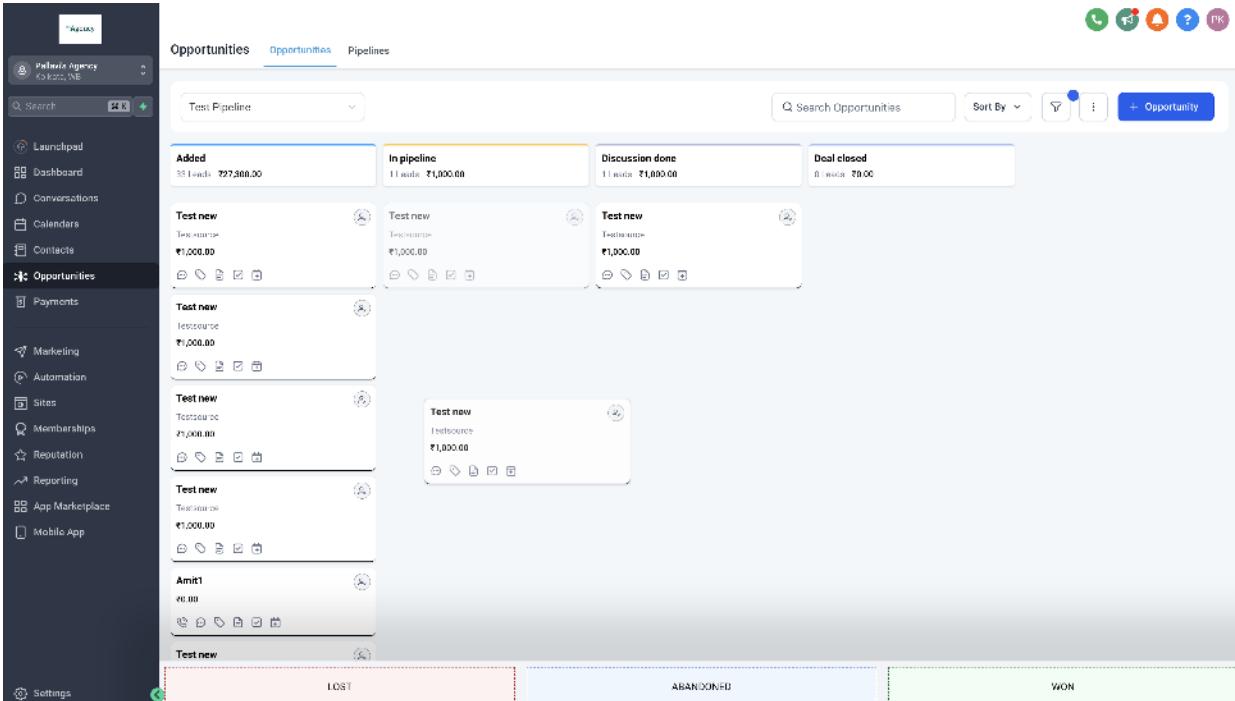
Editing Opportunities



The screenshot shows the Opportunities page with a sidebar on the left containing various navigation links. The main area displays a grid of opportunities. A modal window is open, showing a single opportunity with fields for name, description, and value. The status of this opportunity is currently set to 'In pipeline'.

Step 7: Managing Opportunity Status

- Drag and drop the opportunity to any status as seen in the bottom to update its 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.



The screenshot shows the Opportunities page with a sidebar on the left. The main area displays a grid of opportunities. At the bottom of the page, there is a horizontal bar with three status categories: 'LOST' (red), 'ABANDONED' (blue), and 'WON' (green). The 'LOST' status is highlighted with a red border, indicating it is the current active status for new opportunities.