Next Action Fields In An Opportunity Record

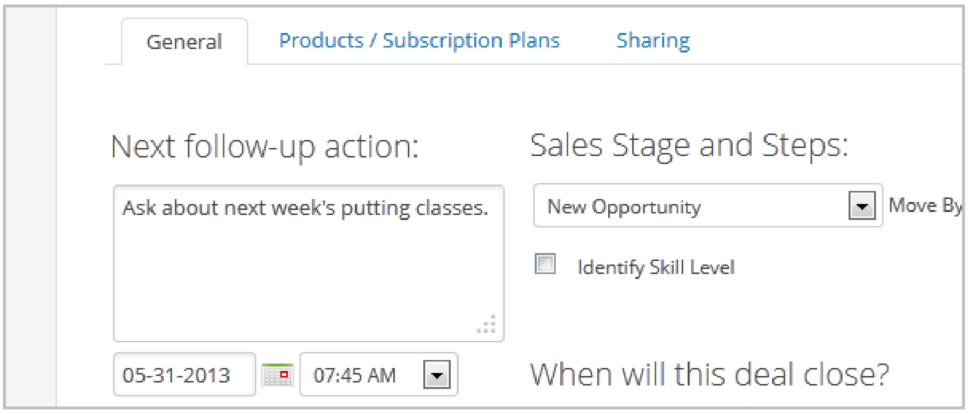
This article applies to:

After you create an opportunity or get assigned to one automatically, you'll use the opportunity record to keep a record of communication and progress through the sales process. Next action dates can help you track task commitments related to the direct sales process, however, there is no way to assign the "next action" to another Max Classic user. If you need to delegate, you should create a task for the person instead. Opportunity next action dates will show up on your Max Classic calendar as appointments in My Day (Note that it will not appear in the appointment section of the "Working" tab in My Day.)

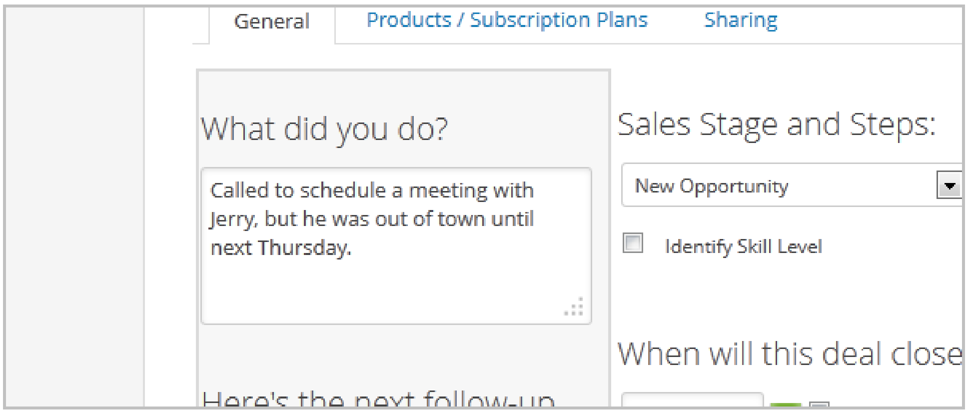
Next Action Date and Notes

Use this area to enter a summary and date for the next manual follow up attempt (i.e. phone call, letter, meeting, etc.). The Next Action Date is used as a search criteria when you create an opportunity list. The notes will remind you of the details (e.g. call to schedule a demo.)

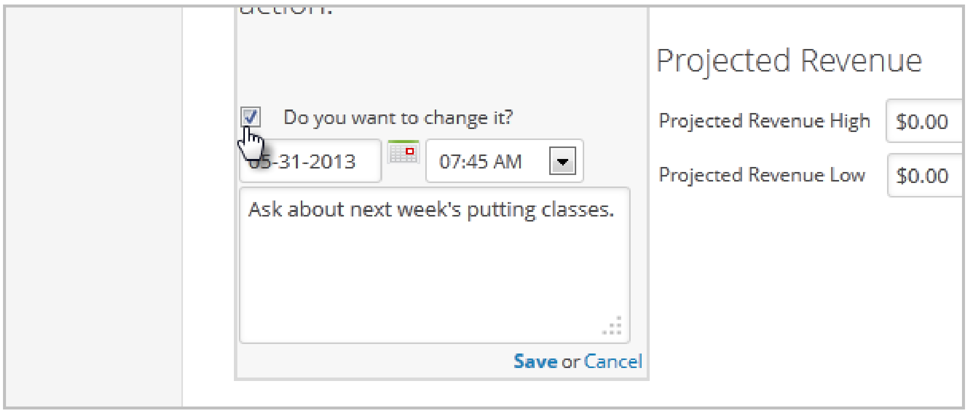
1. Review the next action summary and date.



2. Click on **Add a Note to this Opportunity's history** to make notes about a recent interaction with the prospect and update the next action information as needed.



3. (Optional) Mark the checkbox beside **Do you want to change it?** to update the next action summary and date. Enter the new next action summary and follow up date.



4. Click on **Save** to add the note to the opportunity history and update the next action information.