

# Next Action Fields In An Opportunity Record

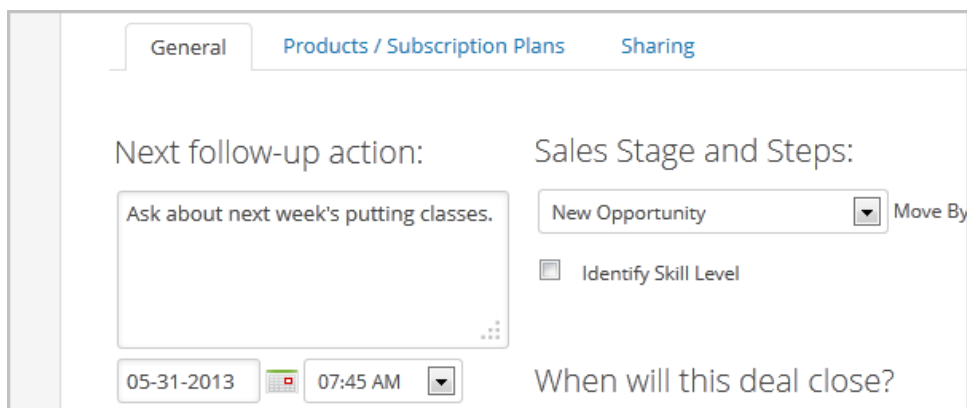
This article applies to:

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

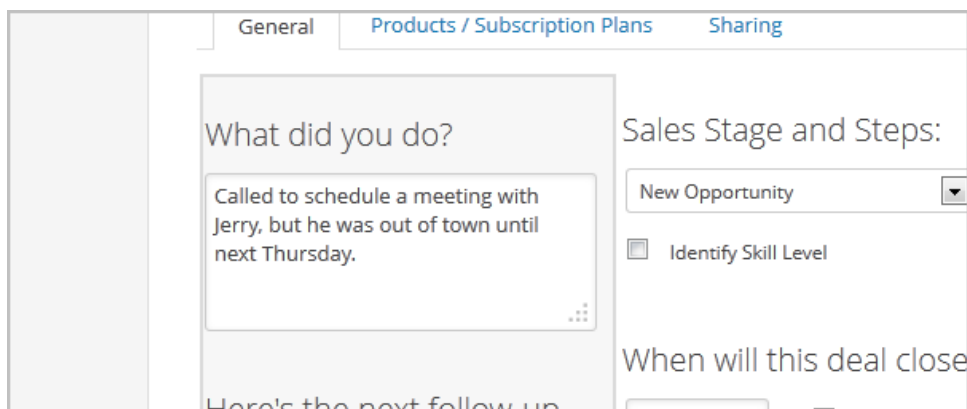
Use this area to enter a summary and date for the next manual follow up attempt (i.e. phone call, letter, meeting, etc.). The Next Action Date is used as a search criteria when you create an opportunity list. The notes will remind you of the details (e.g. call to schedule a demo.)

1. Review the next action summary and date.



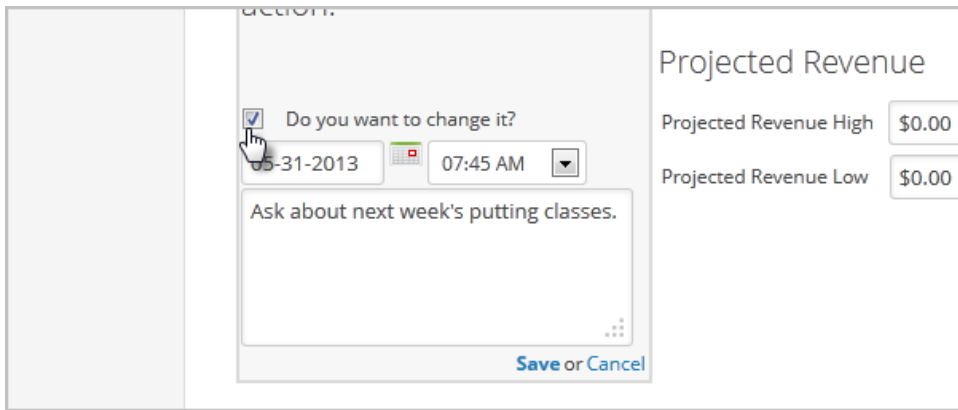
The screenshot shows the 'General' tab of an opportunity record. The 'Next follow-up action' field contains the text 'Ask about next week's putting classes.' Below this field is a date and time selector showing '05-31-2013' and '07:45 AM'. To the right, the 'Sales Stage and Steps' dropdown menu is set to 'New Opportunity'. Below this dropdown is a checkbox labeled 'Identify Skill Level' which is currently unchecked. At the bottom right, there is a label 'When will this deal close?'.

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.



The screenshot shows the 'General' tab of an opportunity record. The 'What did you do?' field contains the text 'Called to schedule a meeting with Jerry, but he was out of town until next Thursday.' Below this field is a date and time selector showing '05-31-2013' and '07:45 AM'. To the right, the 'Sales Stage and Steps' dropdown menu is set to 'New Opportunity'. Below this dropdown is a checkbox labeled 'Identify Skill Level' which is currently unchecked. At the bottom right, there is a label 'When will this deal close?'.

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.

