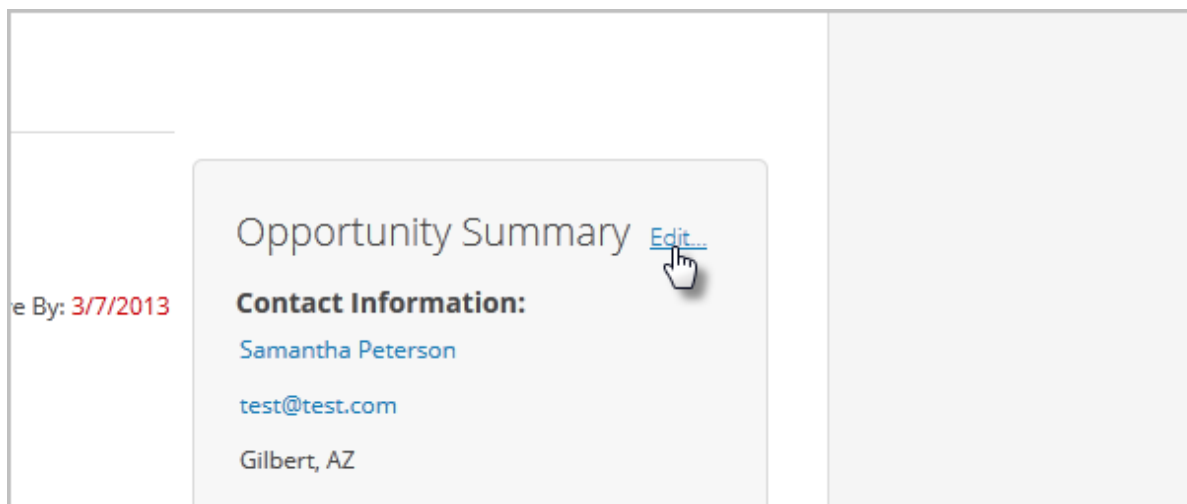


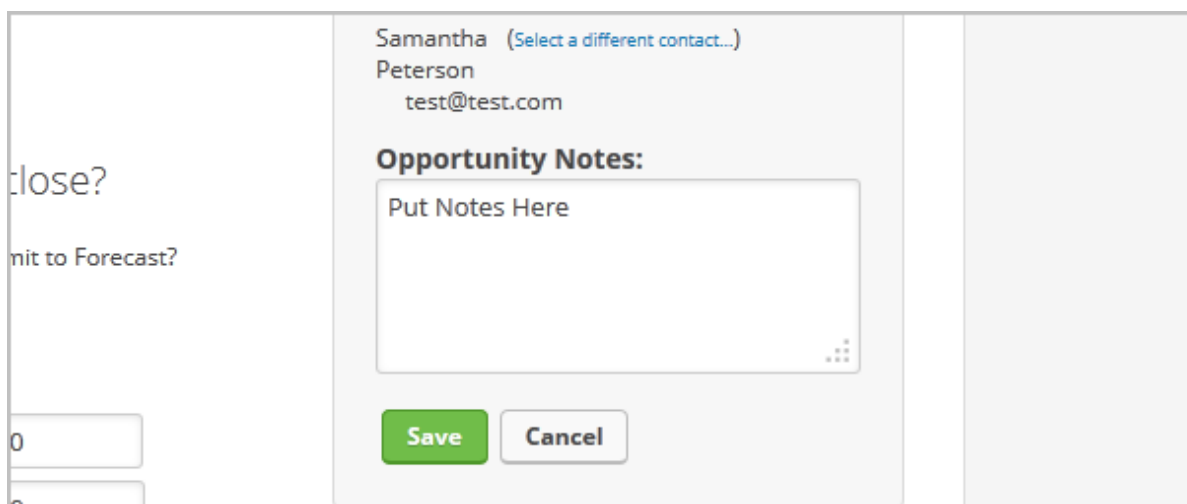
Update The Opportunity Summary

The opportunity summary includes basic contact information for your prospect and notes section. You can click on the prospect's name to view their contact record and/or click on their email address to send them a personal email. The opportunity notes section is the best place to keep information you want "front and center." It is like putting a sticky note at the top of the opportunity record . This information is visible at a glance - it does not get buried in the history. Use this area to keep track of the prospect's specific pain points, personal information (family, trips, hobbies), business description, etc. You can review this information quickly when you call the prospect or send them an email.

1. Click on **Edit** to add or update the summary notes or change the opportunity title.



2. Enter or add to the summary notes, and click on **Save**.



3. If your opportunity notes summary is lengthy, you can click on **Preview Notes** to open them in a new window.

Vendor

High

\$0.00

Low

\$0.00

Opportunity Notes.

Put Notes HerePut Notes HerePut
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[Preview Notes](#)



Created: Mike Bast Wednesday, March 6, 2013 3:13 PM
Last Updated: Martin Cash Wednesday, May 15, 2013 4:49 PM

