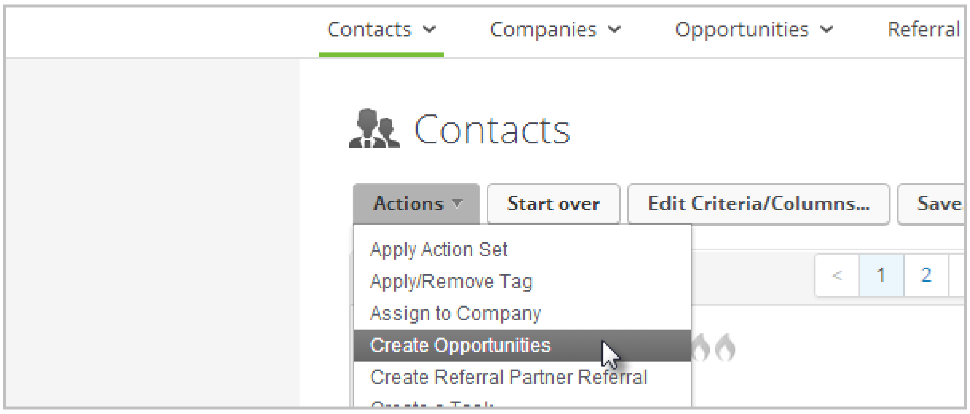
Batch Create Opportunity Records

This article applies to:

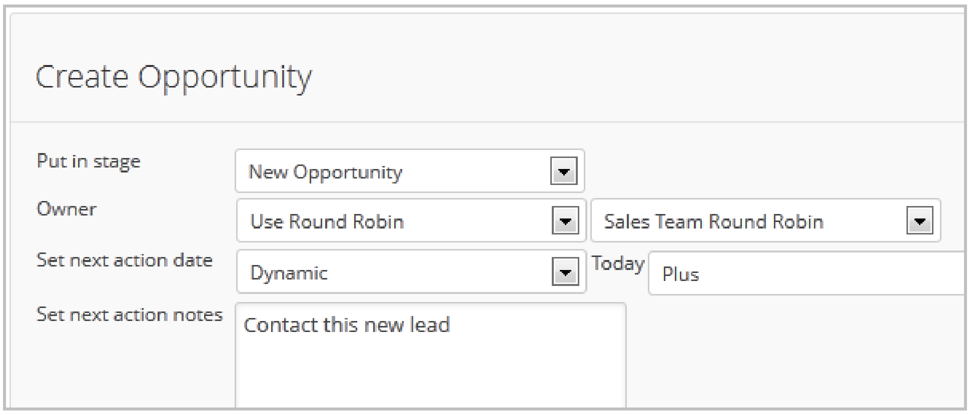
1. Go to **CRM > Contacts** in the main navigation menu.

2. Search for the contact records that you want to create opportunities for.

3. When you have the correct search results, click on the **Actions** button and select select **Create Opportunities** from the drop-down.



4. Select a *Stage* and *User* (or use round robin.)



5. Set the *Next Action Date*. The next action date determines where this opportunity will show up on the sales rep's Max Classic calendar.
   1. **Dynamic**: This is most common. It sets the next action date based on the date the opportunity is created. If you want to set the date for the same date, then set this to "plus 0 days." Using the minus option will allow you to set a date in the past. These will show up as overdue opportunities in opportunity searches.
   2. **Static**: This will assign the same next action date to all new opportunities created through this action. It can be useful to group all event related follow-up on a specific day after the event.

6. Enter *Next Action Notes*. Enter notes for the sales rep to tell them how this lead came to them and / or

provide instructions about how to initiate their follow up.

7. *Only create if a contact doesn't have an active lead already?* This is set to *No* by default. Change this to *Yes* and the system will create another active lead for the prospect, even if there is an existing active lead. This could create a situation where there are two active leads, each assigned to a different sales rep, if you are using a round robin. Set this to *Yes* to keep the system from creating another active lead.

8. (Optional) *Interest Bundle*: Select a product interest bundle from the dropdown. This is most commonly used when the opportunity is created through a trigger event (e.g. form filled out, link clicked, checkbox marked, etc.) that indicates an interest in a specific product or set of products.

9. Click **Save** to save the action.

10. Click the **Process Action** button.