

Campaign Sequence - Create Opportunity

This article applies to:

[Max Classic](#)

Your browser does not support HTML5 video.

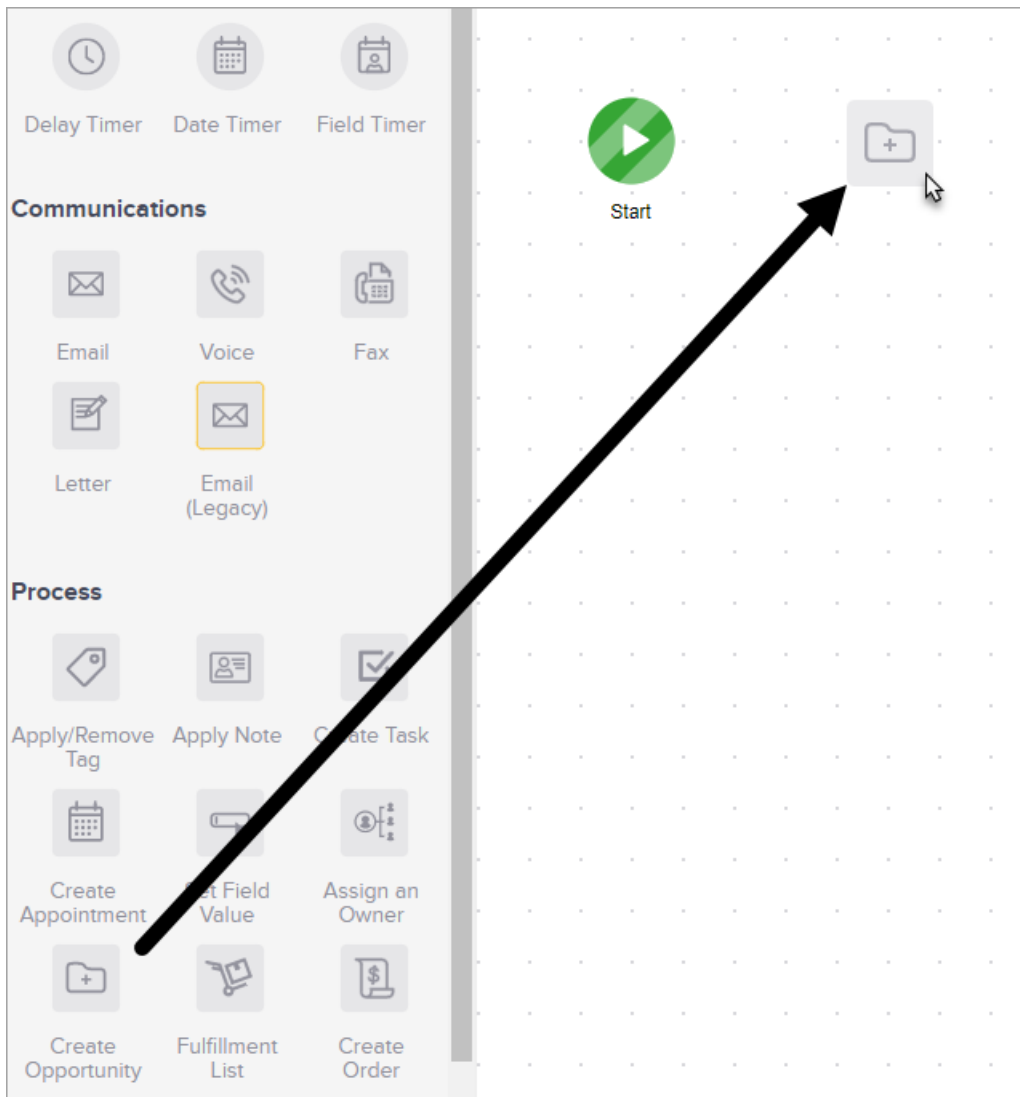
The opportunity object assigns a sales process responsibility to a sales rep. The opportunity is worked over a period of time, until the deal is won or lost. Sales reps use opportunities to store sales process notes, track prospect progress through various sales stages, and keep a record of product interests and potential revenue.

When you add an opportunity object to a campaign sequence, you assign the opportunity to a specific sales rep or a round robin. You also define a sales stage. Before you configure the opportunity objects you need to:

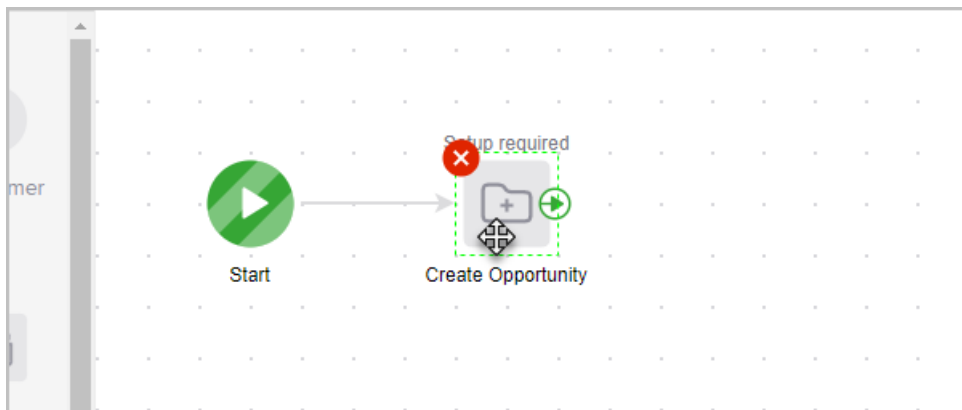
- Assign sales reps to the [sales rep user group](#).
- Set up a sales rep [round robin](#).
- Customize opportunity [sales stages](#).

Please Note! Each opportunity object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. If you delete an opportunity object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Drag and drop a **Create Opportunity** process onto the canvas.



2. Double-click the icon to configure it.



3. Optional: Enter a title for the opportunity. If left blank, the title will default to the name of the contact record.

ate Opportunity

Configure Opportunity

Opportunity Title: Speaking Engagement ?

Starting Stage: Please select one

Assigned User: Use Round Robin... Please sel

Interest Bundle: Please select one

4. Select a starting stage from the drop down.

Opportunity Title: Speaking Engagement ?

Starting Stage: Please select one

Assigned User: Please select one Please s

Interest Bundle: Please select one

Only create if this Contact doesn't already have an active Opportunity?

Next Action Date:

Starting Stage dropdown options: Please select one, **New Opportunity**, Contacting, Qualifying, Qualified, Quote Sent, Quote Accepted, Won, Lost

5. Select a sales rep user from the drop-down or distribute opportunities among multiple users by selecting **around robin**.

Speaking Engagement ?

New Opportunity

Round Robin... Please select one

Please select one

Assigned User dropdown options: Please select one, **Sales Team Blue**

day(s) from now

6. (Optional) Select a **product interest bundle** if the product interest is predictable.

7. (Optional) By default, opportunities are created without checking for other opportunities. Turn on the duplicate checking option if you only want to create new opportunities when no other active opportunities exist.

The screenshot shows a form with the following fields and values:

- Starting Stage: New Opportunity
- Assigned User: Use Round Robin...
- Interest Bundle: Please select one
- Only create if this Contact doesn't already have an active Opportunity?: (A mouse cursor is pointing at this checkbox.)
- Next Action Date: 1 day(s) from now
- Next Action Notes: (Empty text box)

Pro Tip! This is especially important when distributing opportunities through a round robin. It ensures that each prospect with an active opportunity only works with one sales rep at a time.

8. Assign the next action due date and enter **action notes**.

The screenshot shows the form with the following fields and values:

- Only create if this Contact doesn't already have an active Opportunity?:
- Next Action Date: 3 day(s) from now
- Next Action Notes: Gather all additional details not covered in

9. Click **Save** to apply the opportunity settings.

10. Don't forget to publish your changes.
-