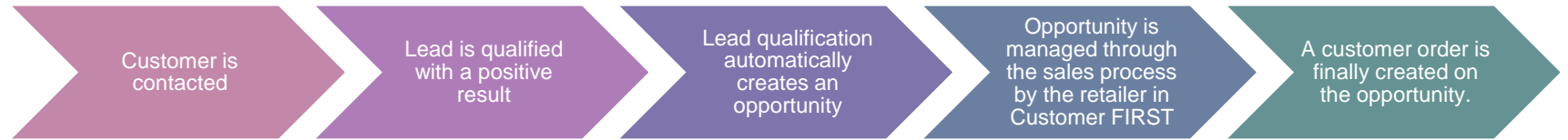




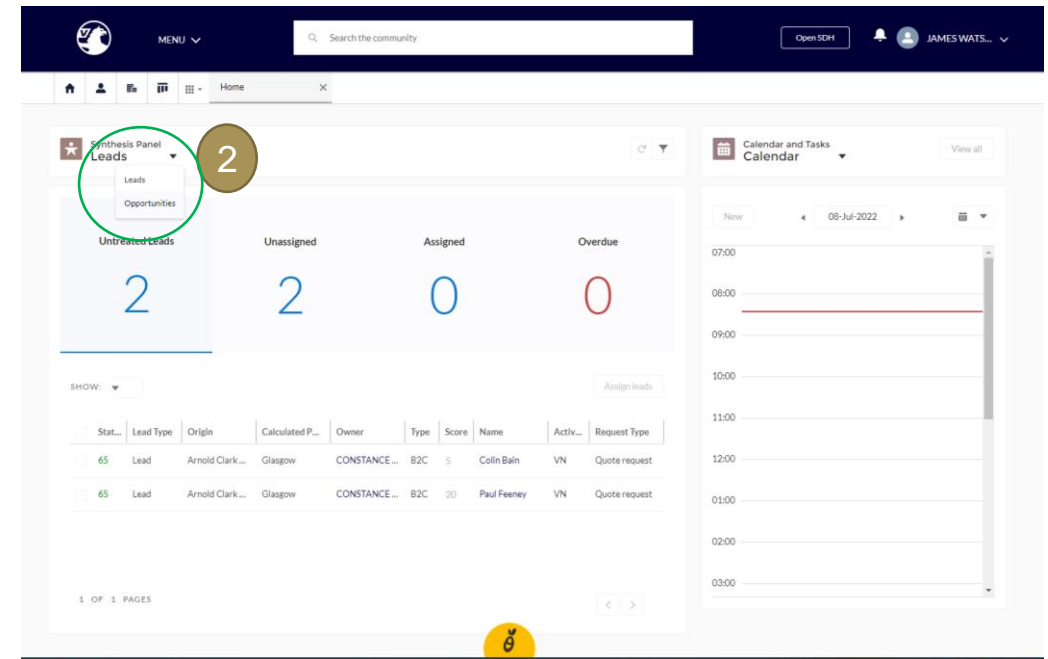
Working with Opportunities

If you have a process with the retailers in your group where you contact customers from leads, mark those leads as qualified and then assign the resulting opportunity to the network to manage IN Customer FIRST, you need to ensure that opportunities are correctly created and assigned.



If you have this process with the retailers in your group you need to:

- 1 Mark the lead with a Positive response (see video 'How to Process a Lead with a Positive Result')
- 2 Switch to the Opportunity Synthesis View



Assigning Opportunities

Working with a retailer in Customer FIRST

Understanding the sales process and assigning opportunities to the network

- 3 Select the newly created opportunity from the list by clicking on the opportunity name.
- 4 Select 'Change owner' from the drop down
- 5 Start typing to select the correct owner in the retailer and click 'change owner' to re-assign the opportunity and notify the user in the network.

