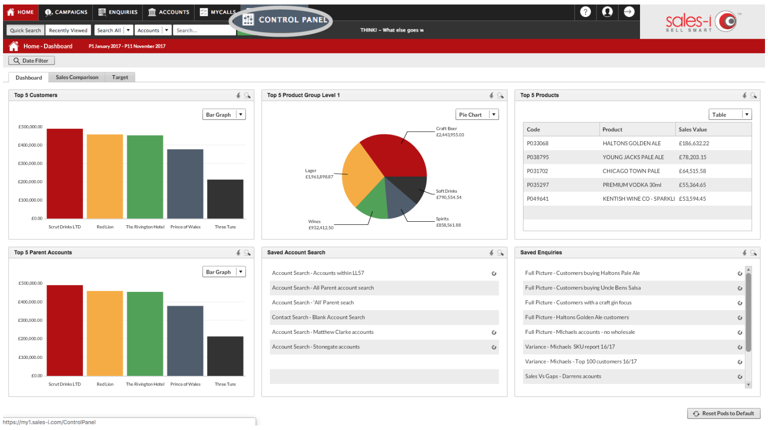
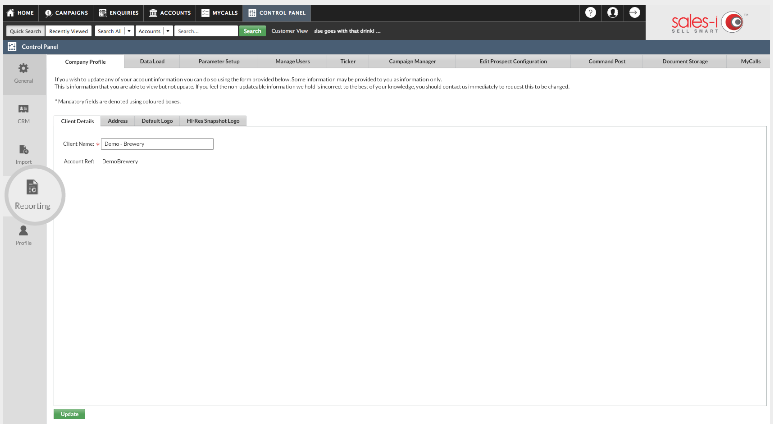
sales-i SELL SMART

HOW TO FILTER OPPORTUNITIES - DESKTOP

This guide will show you how to view and filter your sales opportunities stored within sales-i.
Please note: This feature is currently only available on the desktop version of sales-i.

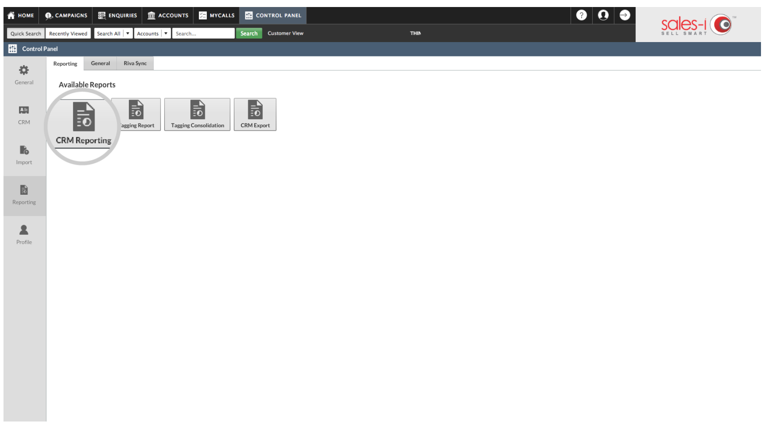
01 From the black navigation bar at the top of the screen, click **CONTROL PANEL**.





02 Choose **Reporting** from the options on the left hand side of the screen.

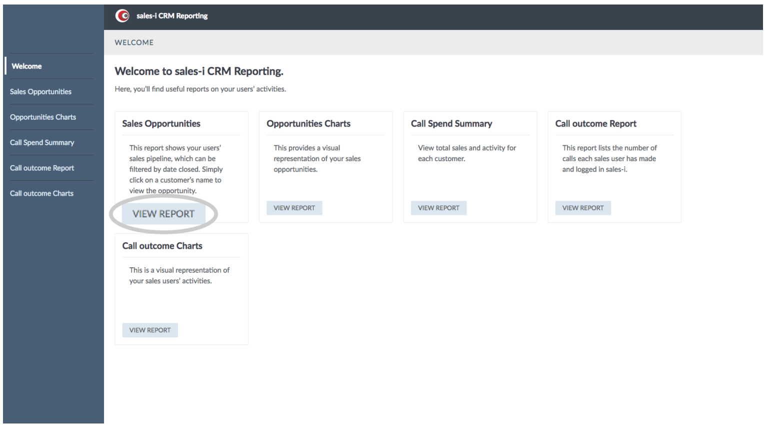
03 Select **CRM Reporting** from the menu in the middle of the screen.

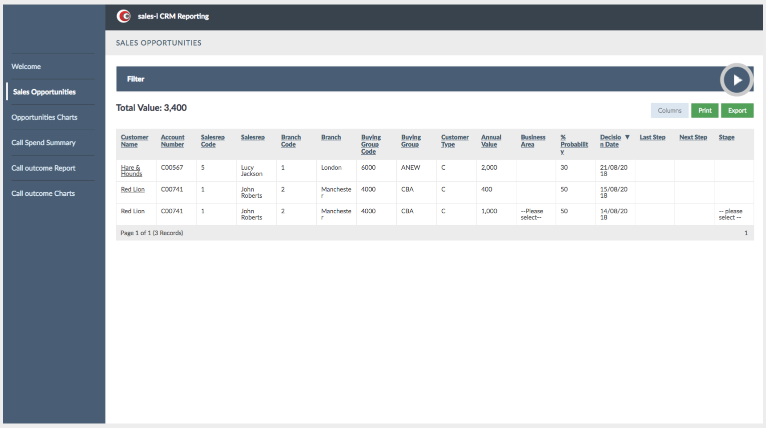


04

Now you want to select the Sales Opportunities report.

To do so, click **VIEW REPORT** in the Sales Opportunities section.





05

To open up the filter options click anywhere on the blue **Filter line**.

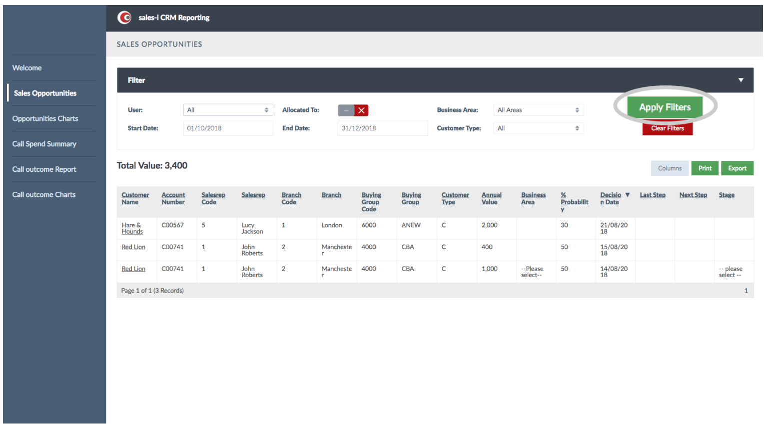
If you are a Sales User, you can now filter your opportunities, set a date range or view opportunities by status.

If you are a Power User or a Team Leader you can also select to view other Sales rep's opportunities as required.

06

Use the filtering options to narrow down your search for opportunities and then click **Apply Filters**.

From the results, you are also able to **Print** or **Export** a list of your current opportunities too.



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support@sales-i.com

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