Company User Guide

How to post opportunities, manage reps, and close deals on SalesExchange

Step 1 — Create Your Company Account

- Download the SalesExchange app
- Create a Company account
- Upload your company logo
- Add your company description and website
- Wait for account approval

Step 2 — Post an Opportunity

The more detailed your opportunity, the better quality reps you will attract.

Your opportunity should include:

- Clear opportunity title
- Detailed description of what you are selling
- Target customer profile
- Commission % or structure
- Estimated deal size range
- Sales materials or resources
- Contact instructions for reps

1. Log in as Company
2. Tap **Post Opportunity**
3. Complete all fields
4. Publish

Step 3 — Reps Claim Your Opportunity

Once your opportunity is live:

- Reps will browse and claim your opportunity
- You can communicate with reps via the platform
- Reps will create deals and update pipeline stages as they progress

Step 4 — Review Deals

When reps create deals, you can:

- Review estimated deal value
- Review rep notes
- Track deal stage progress

Step 5 — Close a Deal

When a rep closes a deal:

5. Open the deal in the platform
6. Enter the final deal value
7. Enter the final commission amount
8. Mark **Closed Won**
9. A commission record is created automatically

Company Best Practices

Respond to reps within 24–48 hours
Provide sales scripts and materials upfront
Clearly define your commission structure
Update deal status promptly
Pay commissions on time to build rep trust

Tips for Attracting Top Reps

Write clear, detailed opportunity descriptions
Offer competitive commission rates
Have a defined sales process ready
Respond quickly to rep inquiries
Be transparent about deal size and timeline