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CRM Opportunity

Cavallo Support - 2025-06-11 - [CRM](#)

Summary

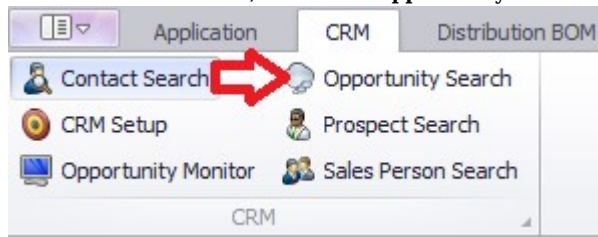
The CRM Module provides a variety of different options for customers to work with different contacts, opportunities, prospects, and other functionalities of CRM. The latest version of the CRM build provides different options such as the new table in import manager for importing prospects. There are a variety of different ways to use the business objects and maximize the amount processes a business is using.

Requirements

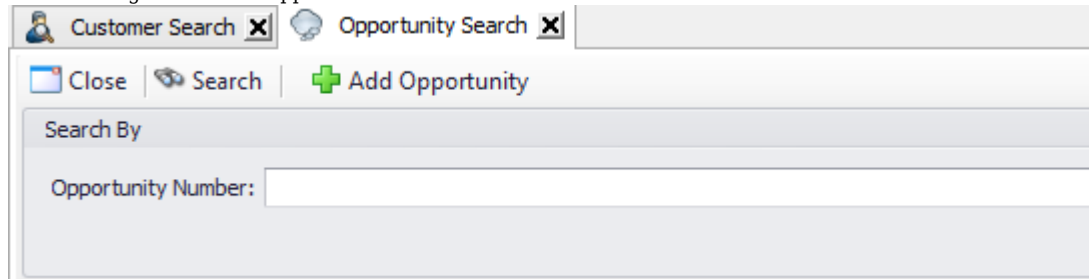
- Must have SalesPad 4.3.2.0 or 4.3.1, which is the official release of the CRM module.
- Obtain the separate DLL from SalesPad Support (this must get dropped in the folder).
- See SalesPad Requirements for more information.

Search

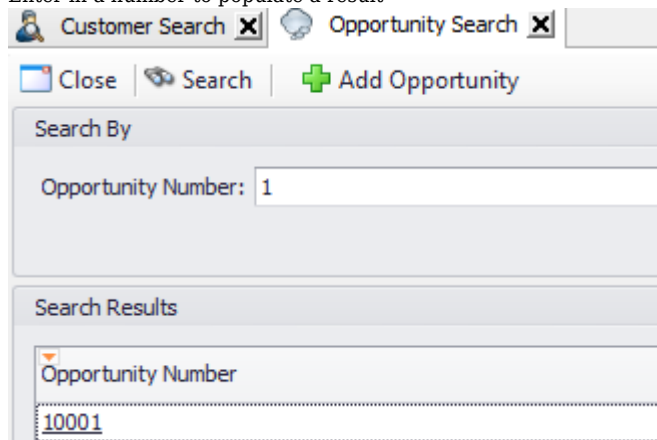
Click on the CRM ribbon, then select **Opportunity Search**.



The following window will appear:



Enter in a number to populate a result



Click on the Opportunity Number to bring up the Opportunity Card.

Customer Search X Opportunity Search X (New) 10001 X

Close Save Delete Historical

Opportunity Properties

Number: 10001

Description: New Servers

Status: New

Amount: \$30,000.00

Sales Rep: Erickson, Gregory

Interactions User Fields Customer Links Prospect Links Contacts

+ Add - Delete Edit

Status	Interaction Type	Contact Person
	Important	Abe, Froman

Create Opportunity

To create an opportunity, you will need to follow the following steps.

Click the CRM tab, and the following screen will appear.

Customer Search X Contact Search X Opportunity Search X

Close Search + Add Opportunity

Search By

Opportunity Number:

Click **Add Opportunity** the following screen will appear:

Customer Search X Contact Search X Opportunity Search X X

Close Save Delete Historical

Number: (Auto Assigned)

Description:

Status:

Amount: \$0.00

Sales Rep:

Sales Territory:

Created By: SA

Created On: 10/31/2014

Updated By: SA

Updated On: 10/31/2014

Expected Close:

Interactions User Fields Customer Links Prospect Links Contacts

+ Add - Delete Edit

Status	Interaction Type	Contact Person
	Important	Abe, Froman

Enter all of the necessary information and click **Save**.

Note: To make further changes, click **Save** or **Delete** on one of the tabs below the Opportunity Card.

Customer Search X Opportunity Search X (New) 10001 X

Close Save Delete Historical

Interactions User Fields Customer Links Prospect Links Contacts

+ Add - Delete Edit

Status	Interaction Type	Contact Person
	Important	Abe, Froman

Note: Click **Historical** to make a historical record of an opportunity.

Customer Search | Opportunity Search | (New) 10001 | CRM Setup | 10002

Close | Save | Delete | Historical

Opportunity is Historical

Opportunity Properties

Number: 10002

Description:

Status:

Amount: \$0.00

Sales Rep:

Sales Territory:

Opportunity Card

The Opportunity Card is broken up into several parts that are listed below:

Customer Search | Opportunity Search | (New) 10001

Close | Save | Delete | Historical

Opportunity Properties

Number: 10001

Description: New Servers

Status: New

Amount: \$29,999.94

Sales Rep: Erickson, Gregory

Sales Territory: TERRITORY 2

Related Properties

Created By: convergence

Created On: 2/24/2014

Updated By: convergence

Updated On: 2/24/2014

Expected Close: 4/30/2014

- Number - Corresponds to the opportunity number.
- Description - Gives a brief explanation of the opportunity.
- Status - Shows the current stage of the opportunity.
- Amount - The price associated with the opportunity.
- Sales Rep - The person handling the opportunity.
- Sales Territory - The area that the opportunity is in.

Properties

Properties show the different options for opportunity properties.

Created By - Shows who made the opportunity. *Created On* - Shows when the opportunity originated. *Updated By* - Shows who modified the opportunity last.

Updated On - Shows when the opportunity was modified.

Expected Close - Shows when the opportunity is predicted to close.

CRM Setup Opportunity Status

This allows the user to set up the different statuses allowed for opportunities.

Click on **CRM Setup**.

Application | CRM | Distribution BOM



Contact Search | Opportunity Search

CRM Setup | Prospect Search

Opportunity Monitor | Sales Person Search

CRM



Scroll down to the Opportunity Status tab.

Opportunity Status		
 Add  Delete		
Status	Description	Created By
New		convergence
30 Day Close		convergence
60 Day Close		convergence
90 Day Close		convergence
Nurture		convergence

Click **Add**.

Opportunity Status		
 Add  Delete		



The following row will appear:

Opportunity Status		
 Add  Delete		
Status	Description	
New		
30 Day Close		
60 Day Close		
90 Day Close		
Nurture		

Create details for the Status, Description, Created By, Created On, Updated By, and Updated On columns.

To Delete

Click on **CRM Setup**, then scroll down to the Opportunity Status tab. Select the row desired to delete.

Opportunity Status		
 Add  Delete		
Status	Description	
New		
30 Day Close		
60 Day Close		
90 Day Close		
Nurture		
Test		

Click **Delete** and the row will disappear.

Assigning Customers

This will allow customers to be assigned to a particular opportunity.

Click on **CRM**, then pull up an Opportunity through an Opportunity Number.

Interactions	User Fields	Customer Links	Prospect Links	Contacts	
<div><div> Add</div><div> Delete</div></div>					
Customer Num	Opportunity Number	Opportunity Description	Opportunity Amount	Expected Close Date	Historical
AARONFIT0001	10001	New Servers	\$29,999.91	4/30/2014	<input type="checkbox"/>
ABBOTTVASCU01	10001	New Servers	\$29,999.91	4/30/2014	<input type="checkbox"/>

To create a new link, click **Add**.

Interactions	User Fields	Customer Links	Prospect Links	Contacts
<div><div><div></div><div>+</div><div>Add</div></div><div><div></div><div>x</div><div>Delete</div></div></div>				
▼				
Customer Num	Opportunity Number	Opportunity Description		
AARONFIT0001	10001	New Servers		
ABBOTTVASCU01	10001	New Servers		

Note: Clicking Delete will delete a link

The following screen will appear:

Customer Lookup

Close

Search

Clear

New

Search By

Customer:

Contact:

Phone:

Sales Rep:

City:

State:

Zip:

Statement Name:

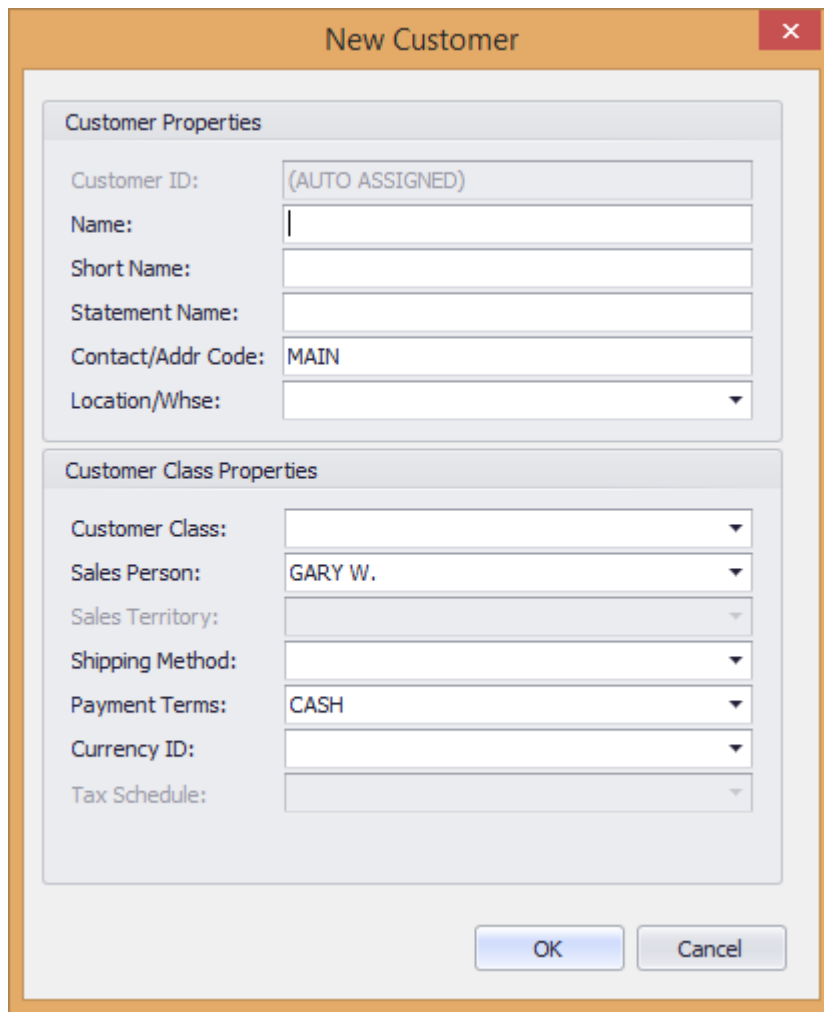
Search Options

☒ Starts With
 ☐ Show Inactive

Search Results

Cust#	Cust Name	Contact	Email	Sales_Person_ID	Address_1	Phone_1	City	State	Zip	Cont
No data to display										

Click **New** to add a New Customer.



New Customer

Customer Properties

Customer ID: (AUTO ASSIGNED)

Name:

Short Name:

Statement Name:

Contact/Addr Code: MAIN

Location/Whse:

Customer Class Properties

Customer Class:

Sales Person: GARY W.

Sales Territory:

Shipping Method:

Payment Terms: CASH

Currency ID:

Tax Schedule:

OK Cancel

Click **OK** to add new information

To search, enter criteria and click **Search**. To erase all information, click **Clear**.

By checking the **Show Inactive** box, all inactive results will be shown as well.

Monitor

This gives users access to the Opportunity Monitor.

Click on the CRM ribbon, then click **Opportunity Monitor**.



The following screen will appear:

Customer Search X Opportunity Search X (New) 10001 X CRM Setup X Opportunity Monitor X			
Close Refresh Refresh: Refresh Manually Sales Rep Filter: (all)			
Select	Status	Count	
<input checked="" type="checkbox"/>		0	
<input checked="" type="checkbox"/>	30 Day Close	0	
<input checked="" type="checkbox"/>	60 Day Close	0	
<input checked="" type="checkbox"/>	90 Day Close	0	
<input checked="" type="checkbox"/>	New	1	
<input checked="" type="checkbox"/>	Nurture	0	
Opportunity ID Opportunity Number Opportunity Description			
Opportunity Status: New (SUM=29999.91)			
	1	10001	New Servers

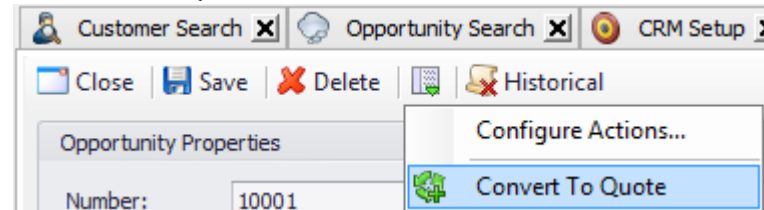
This will allow you to monitor various Opportunities.

Convert to Quote

Open the Opportunity that needs to be quoted, then click the **Actions** dropdown between the **Delete** and **Historical** buttons.



Click **Convert to Quote**.



The following screen will appear:

Convert Opportunity To Quote

Type	Number	Name
Prospect	1	Abe's Electronics
Customer	AARONFIT0001	AARONFIT0001
Customer	ABBOTTVASCU01	ABBOTTVASCU01

OK Cancel

Select the customer that needs to be quoted and click **OK**.

Customer Search Opportunity Search CRM Setup Prospect Search Q1112 Q112

Close Save Print Delete Copy Dynamics GP

Document Properties

Document #: Q1112
Customer #: AARONFIT0001
Sales Rep: SALES
Res Ship: 11/2/2014
Ship Method: UPS GROUND
Whse: WAREHOUSE
Currency: ZLUS

QUOTE (DISTRIBUTION)
Sales Rep: SALES
Pay Terms: NET 30
Doc Date: 11/2/2014
Created By:
Approved By:

Shipping Address
Aaron Fit Electrical
Robert Fitz J.
1201 3rd Ave
Chicago, IL 60603-0776
P: (312) 555-0102
F: (312) 555-0102

Additional Properties
Batch/CI: ESTIMATING QUOTE
Price Level: RETAIL
Discounts: 10% STANDARD
Ship Complete
No Transfer

Totals - Q1112 (\$0.00) (0.00%)
Max Charge: 0.00
Discounts: 0.00
Freight: 0.00
Tax: 0.00
Total: 0.00
Payments: 0.00

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Tracking Numbers Interactions Sales Line Tracking Numbers

New Delete Insert

Item	Description	Qty	UOM	Price	Cost	Ext Price	Req Ship	Qty BQ	Comment
------	-------------	-----	-----	-------	------	-----------	----------	--------	---------

The following screen will appear. Use the desired tabs to enter criteria in the quote.

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Tracking Numbers Interactions Sales Line Tracking Numbers

New Delete Insert

Item	Description	Qty	UOM	Price
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Prospect Links

Open the Prospect Search in the CRM ribbon and click on **Prospect Links**.

Interactions	User Fields	Customer Links	Prospect Links	Contacts
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+ Add - Delete

Opportunity Number	Opportunity Amount	Opportunity Description	Expected Close Date	Historical
10001	\$29,999.91	New Servers	4/30/2014	<input type="checkbox"/>

Click on the listed Opportunity to edit. Click **Add** to add a new link, or click **Delete** to erase a link.

Interactions

Open Opportunity Search in the CRM ribbon. Click **Edit** to modify an Interaction.

Interactions		
<div><div><div></div></div><div><div></div></div><div><div></div></div></div>		
Status	Interaction Type	Contact Person
	Important	Abe, Froman

Click **Add** to create a new Interaction. Click **Delete** to erase an existing Interaction.

User Fields

For more information on User Fields in SalesPad, please refer to the [User Defined Fields](#) documentation.

Security

In the Security Editor in SalesPad, search for *Opportunity. This will show you all of the forms and plugins associated with the Opportunity functionality.

Security	
<div><div><div></div></div><div><div></div></div><div><div></div></div></div>	
Access	Name
<div><div></div></div>	*Opp
<div><div></div></div>	Sales Person Opportunities (Beta)
<div><div></div></div>	Prospect Opportunities*
<div><div></div></div>	Opportunity User Fields*
<div><div></div></div>	Opportunity Search*
<div><div></div></div>	Opportunity Prospect Links*
<div><div></div></div>	Opportunity Properties*
<div><div></div></div>	Opportunity Monitor
<div><div></div></div>	Opportunity Interactions*
<div><div></div></div>	Opportunity Customer Links*
<div><div></div></div>	Opportunity Contacts*
<div><div></div></div>	Opportunity Card*
<div><div></div></div>	Customer Opportunities*
<div><div></div></div>	CRM Setup Opportunity Status
<div><div></div></div>	<div><div></div><div>Contains([Name], 'Opp')</div></div>

Check all of the boxes to turn on the module.