



CRM Opportunity

Megan De Freitas - 2024-11-22 - CRM

Summary

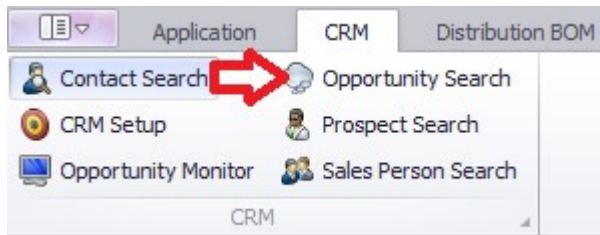
The CRM Module provides a variety of different options for customers to work with different contacts, opportunities, prospects, and other functionalities of CRM. The latest version of the CRM build provides different options such as the new table in import manager for importing prospects. There are a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

Requirements

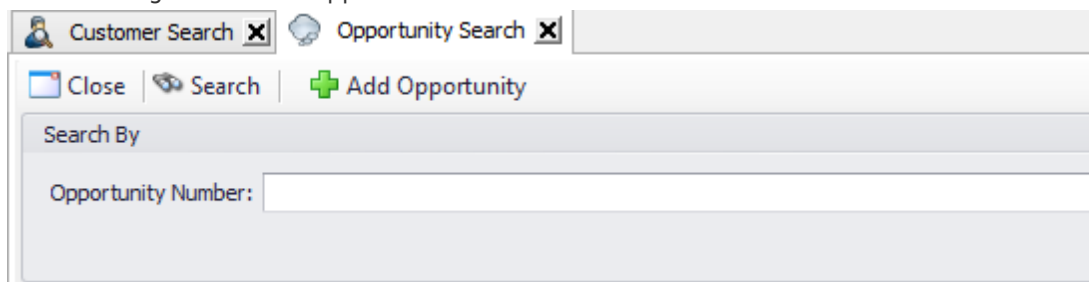
- Must have SalesPad 4.3.2.0 or 4.3.1, which is the official release of the CRM module.
- Obtain the separate DLL from SalesPad Support (this must get dropped in the folder).
- See SalesPad Requirements for more information.

Search

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



The following window will appear:



Enter in a number to populate a result

Customer Search [X] Opportunity Search [X]

Close Search Add Opportunity

Search By

Opportunity Number: 1

Search Results

Opportunity Number
10001

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]

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

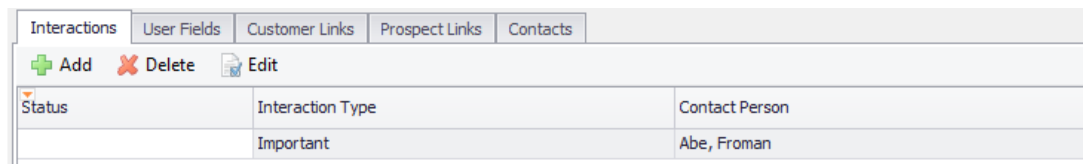
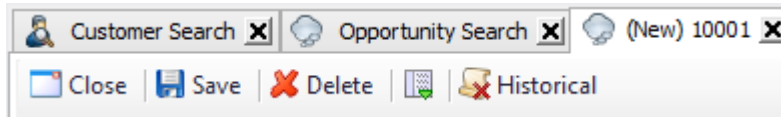
Updated On: 10/31/2014

Expected Close:

Interactions User Fields Customer Links Prospect Links Contacts

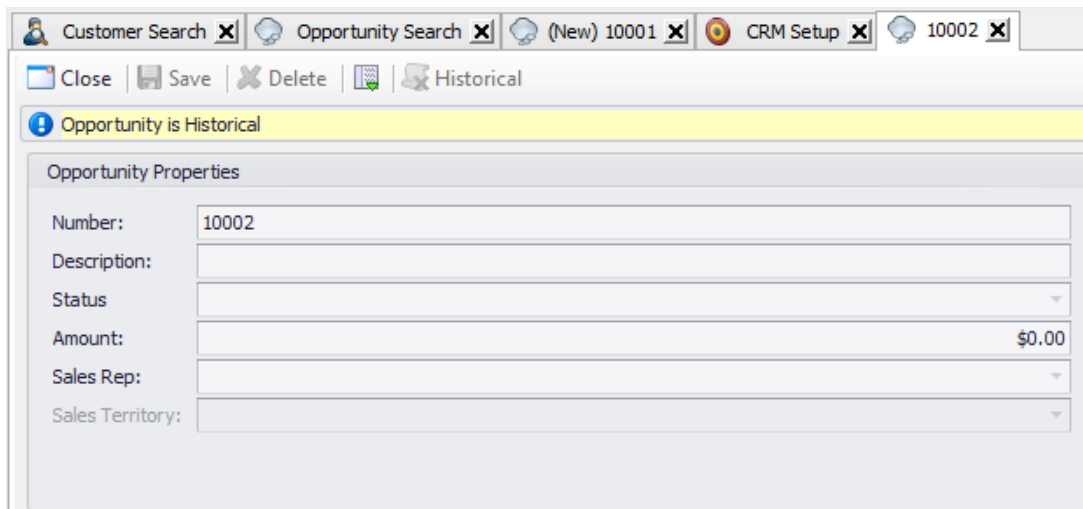
Enter all of the necessary information and click **Save**.

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



Status	Interaction Type	Contact Person
	Important	Abe, Froman

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



Opportunity Properties

Number: 10002

Description:

Status:

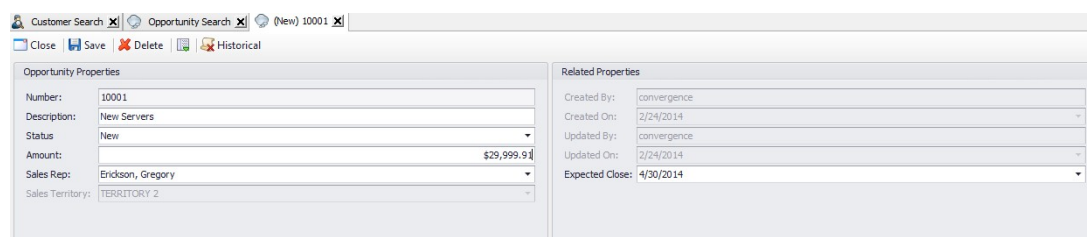
Amount: \$0.00

Sales Rep:

Sales Territory:

Opportunity Card

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



Opportunity Properties

Number: 10001

Description: New Servers

Status: New

Amount: \$29,999.91

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.

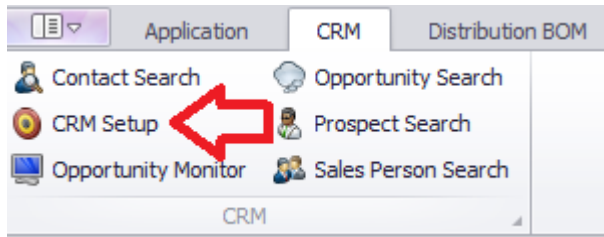
Updated On - Shows when the opportunity was modified.

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.

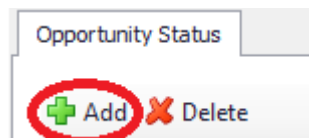
Click on **CRM Setup**.



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**.



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><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></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

+

Add

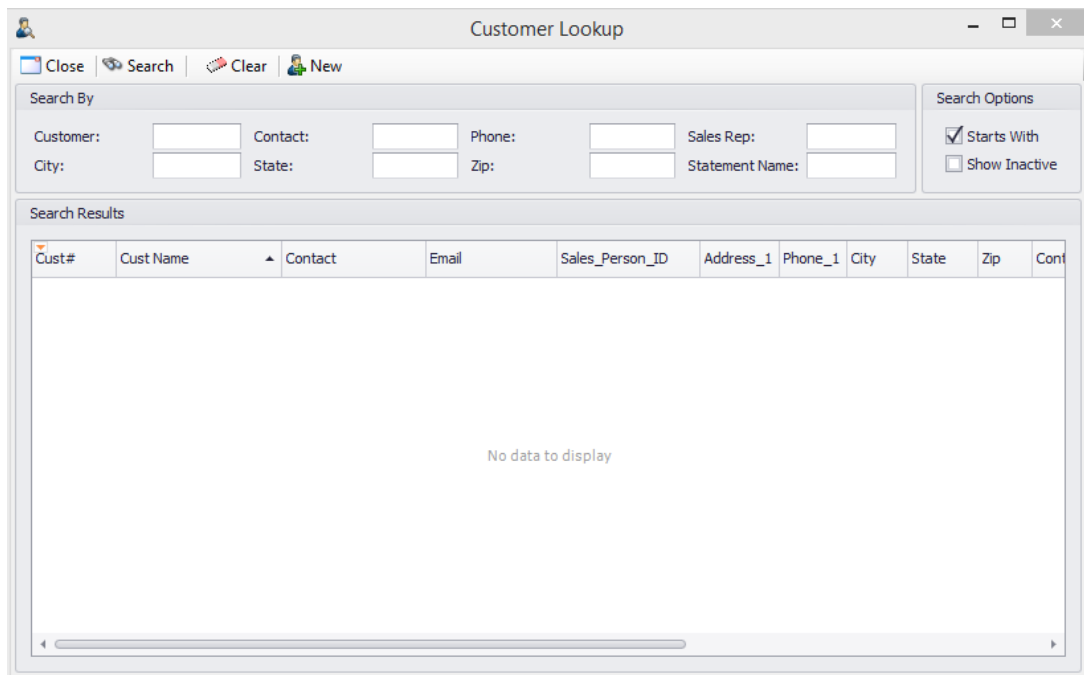
×

Delete

Customer Num	Opportunity Number	Opportunity Description
AARONFIT0001	10001	New Servers
ABBOTTVASCU01	10001	New Servers

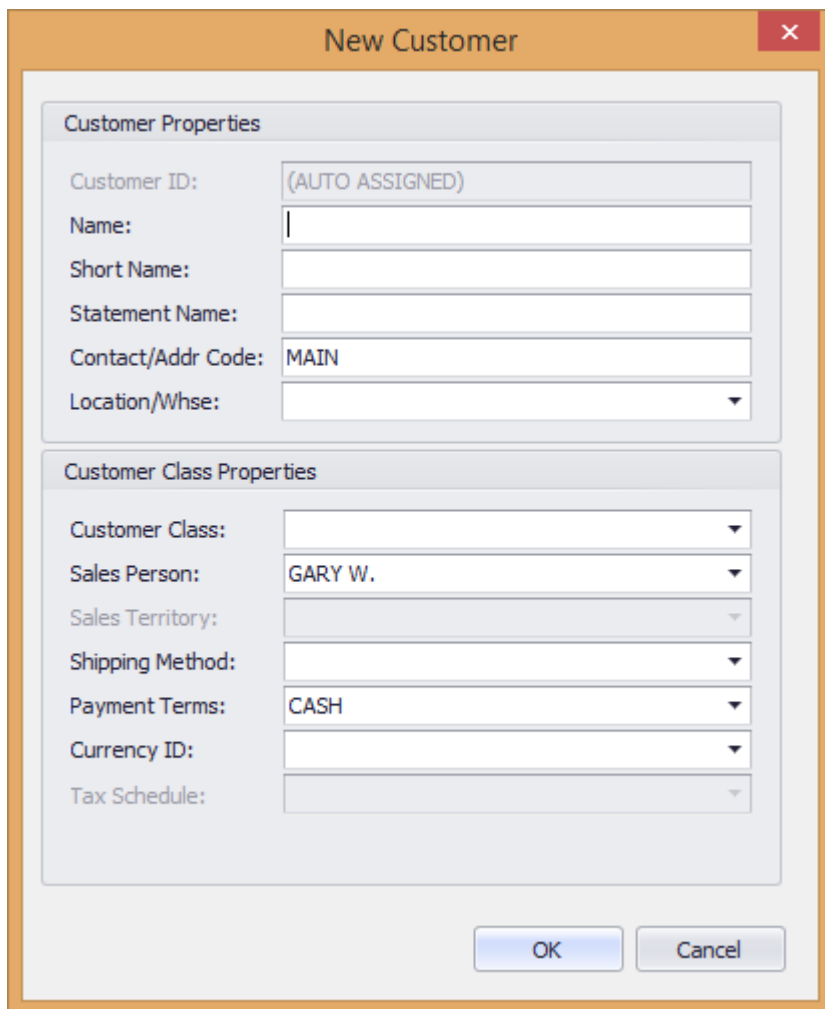
Note: Clicking Delete will delete a link

The following screen will appear:



The **Customer Lookup** window features a toolbar with **Close**, **Search**, **Clear**, and **New** buttons. Below the toolbar is a **Search By** section with input fields for Customer, Contact, Phone, Sales Rep, City, State, Zip, and Statement Name. To the right is a **Search Options** section with checkboxes for **Starts With** and **Show Inactive**. The main area is labeled **Search Results** and contains a table with the following columns: Cust#, Cust Name, Contact, Email, Sales_Person_ID, Address_1, Phone_1, City, State, Zip, and Cont. The table is currently empty, displaying the message "No data to display".

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



The **New Customer** window is divided into two main sections: **Customer Properties** and **Customer Class Properties**. The **Customer Properties** section includes fields for Customer ID (set to (AUTO ASSIGNED)), Name, Short Name, Statement Name, Contact/Addr Code (set to MAIN), and Location/Whse (a dropdown menu). The **Customer Class Properties** section includes dropdown menus for Customer Class, Sales Person (set to GARY W.), Sales Territory, Shipping Method, Payment Terms (set to CASH), Currency ID, and Tax Schedule. At the bottom of the window are **OK** and **Cancel** buttons.

Click **OK** to add new information

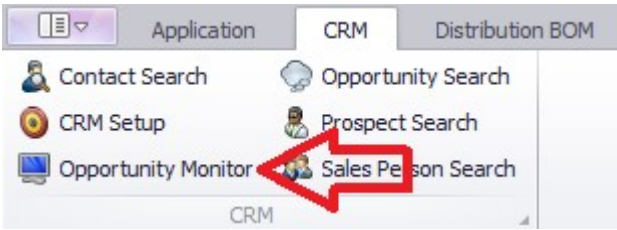
To search, enter criteria and click **Search**. To erase all information, click **Clear**.

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

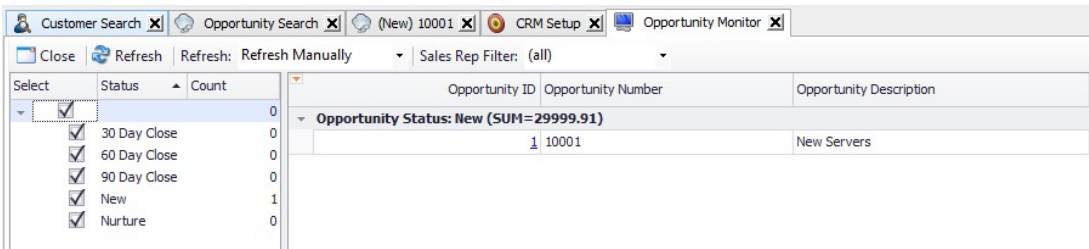
Monitor

This gives users access to the Opportunity Monitor.

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



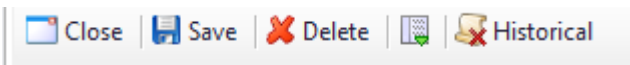
The following screen will appear:



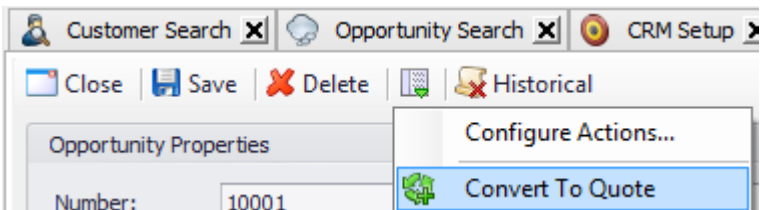
This will allow you to monitor various Opportunities.

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

Select Customer or Prospect		
Type	Number	Name
Prospect	<u>1</u>	Abe's Electronics
Customer	AARONFIT0001	AARONFIT0001
Customer	ABBOTTVASCU01	ABBOTTVASCU01

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

Customer Search | Opportunity Search | CRM Setup | Prospect Search | Q1112

Close | Save | Print | Delete | Copy | Dynamics GP

Document Properties		Shipping Address		Additional Properties		Totals - Q1112 [0.00%]	
Document #:	Q1112	Customer #:	AARONFIT0001	Batch/Qty:	ENDING QUOTE	Misc Charges:	0.00
Customer #:	AARONFIT0001	Customer Name:	Aaron Fitz Electrical	Price Level:	RETAIL	Discounts:	0.00
Cust PO:	NEW SERVERS	Sales Rep:	SAV N	Discounts:	10% STANDARD	Freight:	0.00
Req Ship:	11/20/2014	Pay Terms:	NET 30	Discounts:		Tax:	0.00
Ship Method:	UPS GROUND	Doc Date:	11/20/2014	Discounts:		Total:	0.00
Where:	WAREHOUSE	Created By:		Discounts:		Payments:	0.00
Currency:	USD	Approved By:		Discounts:			

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

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

+ 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 | User Fields | Customer Links | Prospect Links | Contacts

+ Add - Delete Edit

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

☒ Select All

☐ Select None

Access	Name
<input type="checkbox"/>	*Opp
<input checked="" type="checkbox"/>	Sales Person Opportunities (Beta)
<input checked="" type="checkbox"/>	Prospect Opportunities*
<input checked="" type="checkbox"/>	Opportunity User Fields*
<input checked="" type="checkbox"/>	Opportunity Search*
<input checked="" type="checkbox"/>	Opportunity Prospect Links*
<input checked="" type="checkbox"/>	Opportunity Properties*
<input checked="" type="checkbox"/>	Opportunity Monitor
<input checked="" type="checkbox"/>	Opportunity Interactions*
<input checked="" type="checkbox"/>	Opportunity Customer Links*
<input checked="" type="checkbox"/>	Opportunity Contacts*
<input checked="" type="checkbox"/>	Opportunity Card*
<input checked="" type="checkbox"/>	Customer Opportunities*
<input checked="" type="checkbox"/>	CRM Setup Opportunity Status
<input checked="" type="checkbox"/>	Contains([Name], 'Opp') ▼

Check all of the boxes to turn on the module.