



CRM Opportunity

Megan De Freitas - 2024-11-22 - CRM

Summary

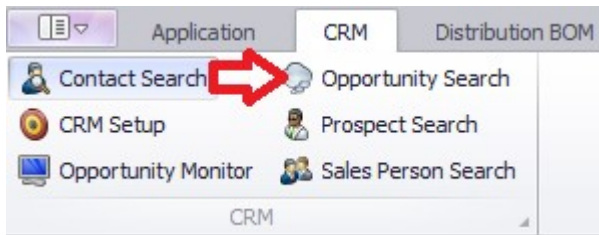
The CRM Module provides a variety of different options for customers to work with different contacts, opportunities, prospects, and other functionalities of CRM. The latest version of the CRM build provides different options such as the new table in import manager for importing prospects. There are a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

Requirements

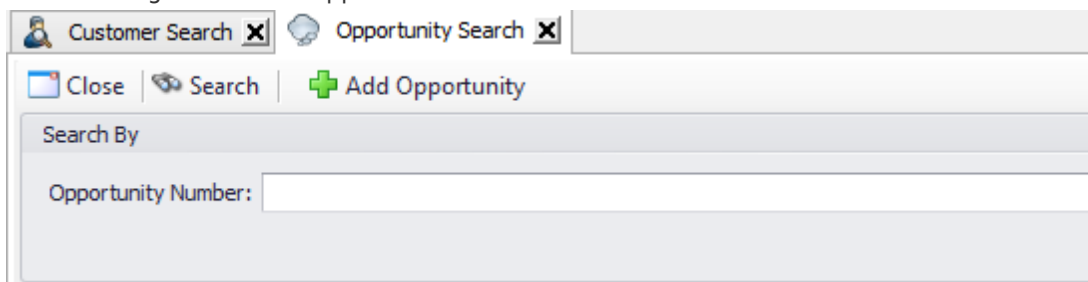
- Must have SalesPad 4.3.2.0 or 4.3.1, which is the official release of the CRM module.
- Obtain the separate DLL from SalesPad Support (this must get dropped in the folder).
- See SalesPad Requirements for more information.

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.

The screenshot shows the top navigation area with tabs for Customer Search, Opportunity Search, and (New) 10001. Below the tabs are buttons for Close, Save, Delete, and Historical. The main content area has tabs for Interactions, User Fields, Customer Links, Prospect Links, and Contacts. Under the Interactions tab, there are buttons for Add, Delete, and Edit. A table below shows interaction data:

Status	Interaction Type	Contact Person
	Important	Abe, Froman

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

The screenshot shows the top navigation area with tabs for Customer Search, Opportunity Search, (New) 10001, CRM Setup, and 10002. Below the tabs are buttons for Close, Save, Delete, and Historical. A yellow banner at the top of the main content area reads "Opportunity is Historical". Below the banner is the "Opportunity Properties" form:

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:

The screenshot shows the top navigation area with tabs for Customer Search, Opportunity Search, and (New) 10001. Below the tabs are buttons for Close, Save, Delete, and Historical. The main content area is divided into two sections: "Opportunity Properties" and "Related Properties".

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.

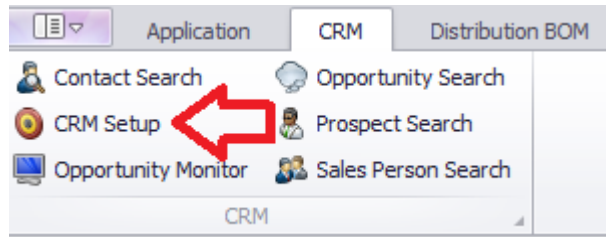
Updated On - Shows when the opportunity was modified.

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

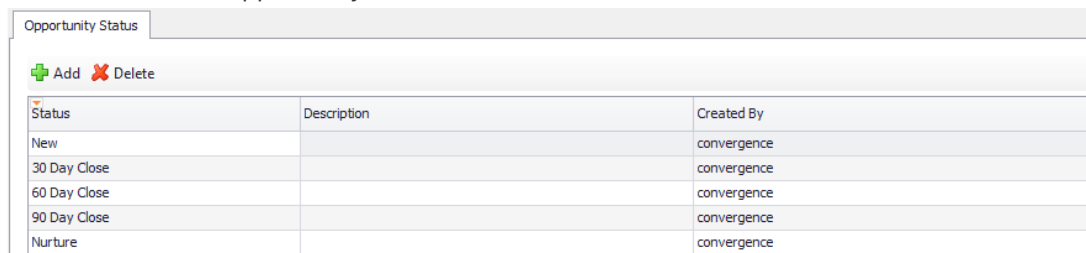
CRM Setup Opportunity Status

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

Click on **CRM Setup**.



Scroll down to the Opportunity Status tab.

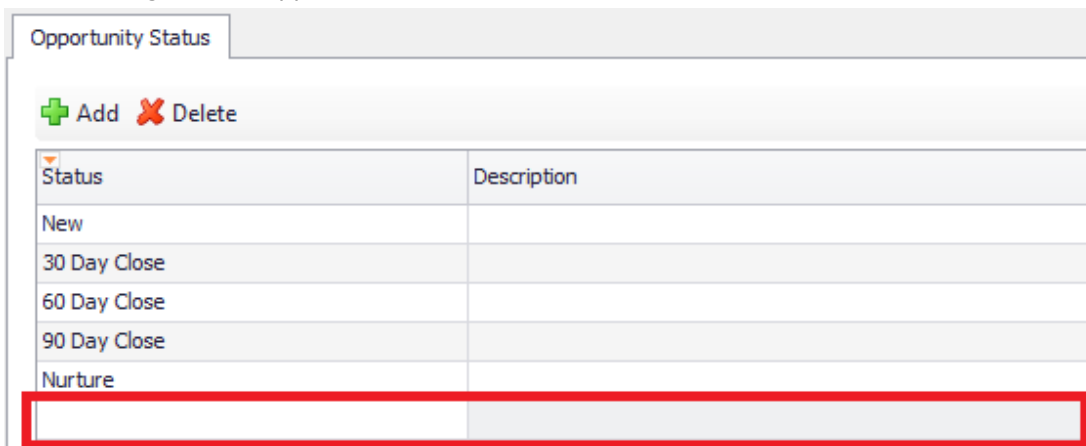


Status	Description	Created By
New		convergence
30 Day Close		convergence
60 Day Close		convergence
90 Day Close		convergence
Nurture		convergence

Click **Add**.



The following row will appear:



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 X 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	
+ Add X Delete					
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 X 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:

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

Click **OK** to add new information

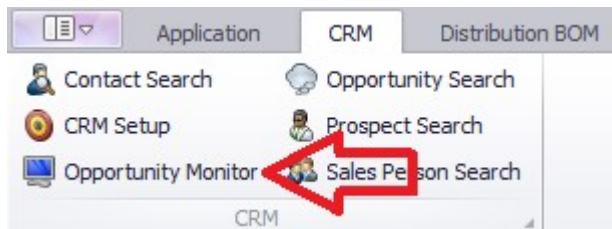
To search, enter criteria and click **Search**. To erase all information, click **Clear**.

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

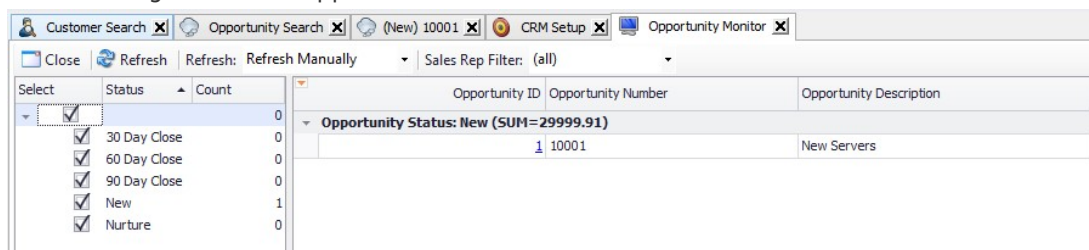
Monitor

This gives users access to the Opportunity Monitor.

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



The following screen will appear:



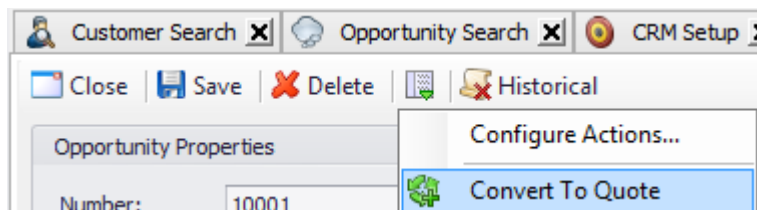
This will allow you to monitor various Opportunities.

Convert to Quote

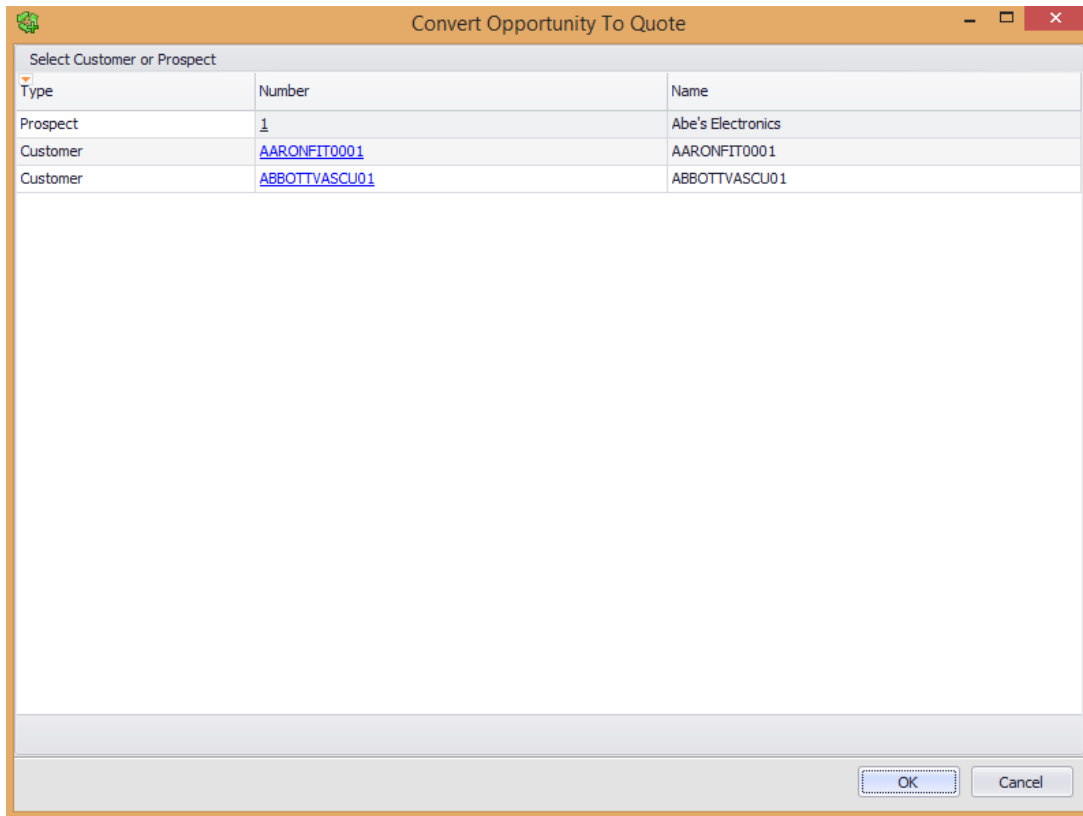
Open the Opportunity that needs to be quoted, then click the **Actions** dropdown between the **Delete** and **Historical** buttons.



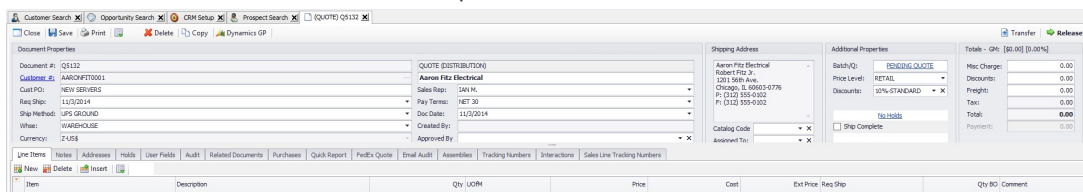
Click **Convert to Quote**.



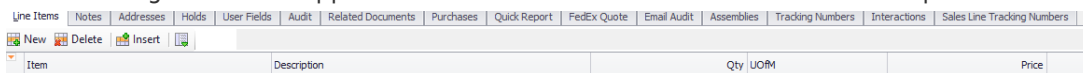
The following screen will appear:



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

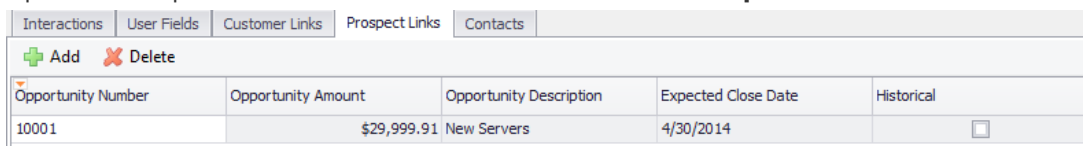


The following screen will appear. Use the desired tabs to enter criteria in the quote.



Prospect Links

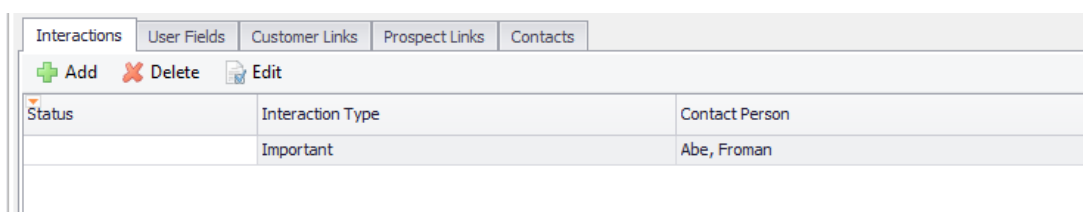
Open the Prospect Search in the CRM ribbon and click on **Prospect Links**.



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.



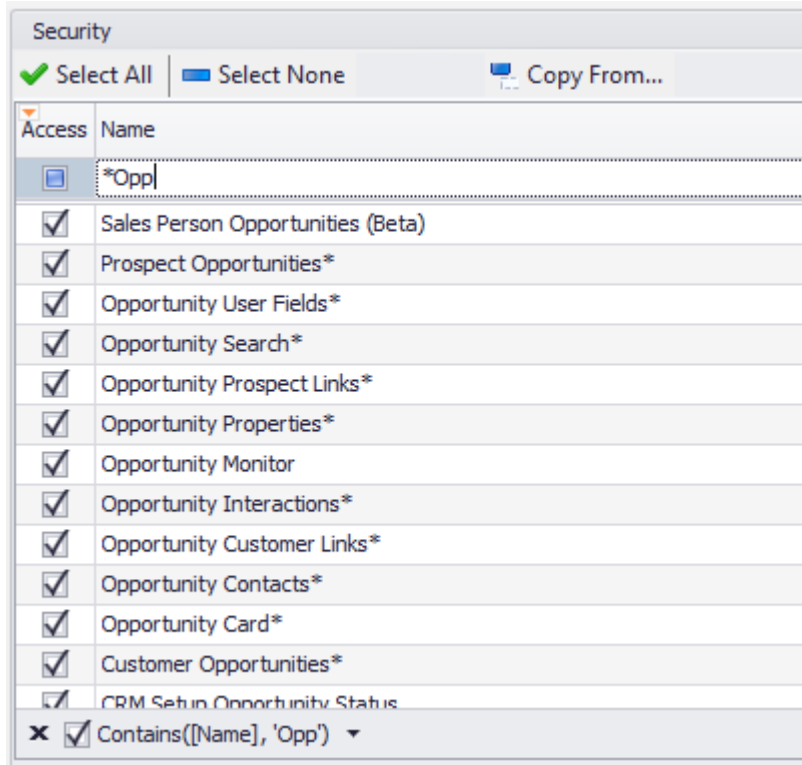
Click **Add** to create a new Interaction. Click **Delete** to erase an existing Interaction.

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		
<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> Select None	<input data-bbox="746 555 922 589" type="button" value="Copy From..."/>
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"/>	<input checked="" type="checkbox"/> Contains([Name], 'Opp') ▾	

Check all of the boxes to turn on the module.