



CRM Sales Territory

Megan De Freitas - 2024-11-22 - CRM

Overview

The CRM Module provides a variety of different options for customer to work with different contacts, opportunities, prospects, and other functionalities of CRM. The latest version of the CRM build provides the ability to maintain Sales Territories in SalesPad. Sales Territory Search and Sales Territory Card are used to search and maintain Sales Territories in SalesPad, respectively.

Note: This is only available in versions of SalesPad 4.3.2.10 or higher.

Settings, Security & Setup

1. In Security Editor, search for Sales Territory

Access	Name
<input type="checkbox"/>	*Sales Territory
<input checked="" type="checkbox"/>	Sales Territory Card*
<input checked="" type="checkbox"/>	Sales Territory Commissions*
<input checked="" type="checkbox"/>	Sales Territory Properties*
<input checked="" type="checkbox"/>	Sales Territory Search
<input checked="" type="checkbox"/>	Sales Territory User Fields*

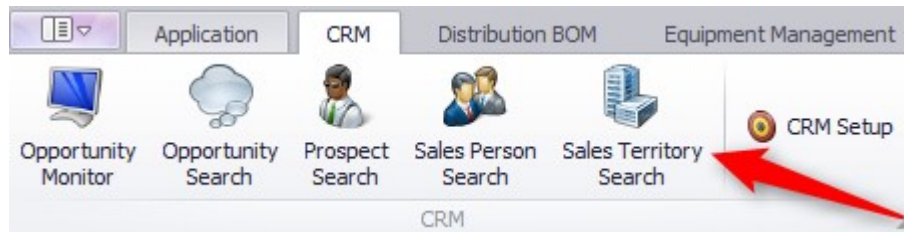
2. Check the boxes to allow access to each form

Note: Set each sub-security, respectively

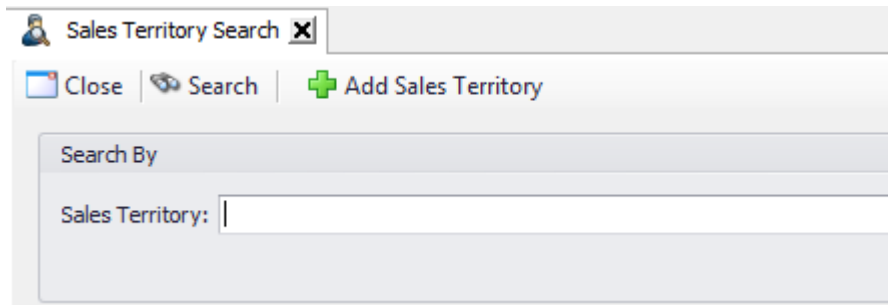
Usage

Sales Territory Search

The **Sales Territory Search** form can be accessed from the CRM Ribbon.



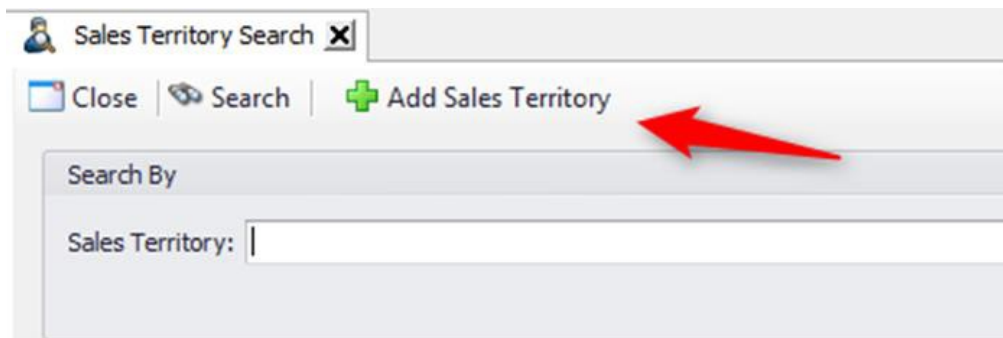
1. Enter text and search to populate the grid with search results



2. Click on the Sales Territory to bring up the Sales Territory Card

Create Sales Territory

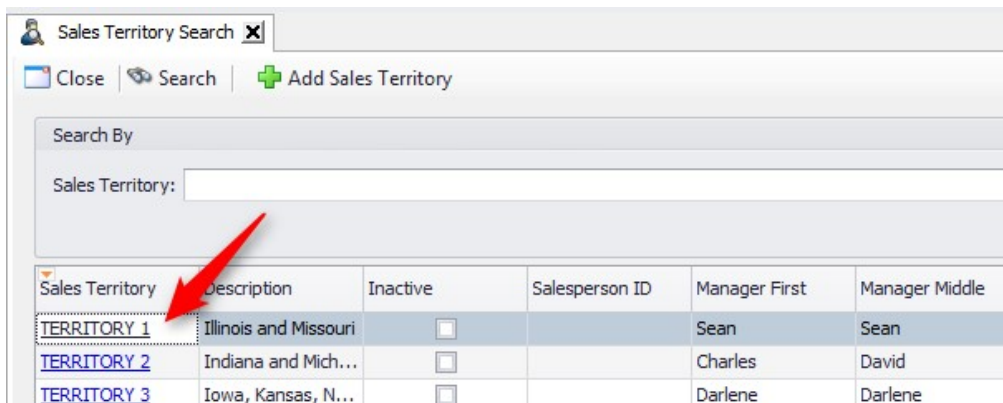
1. Click **Add Sales Territory** from the Sales Territory Search form



2. A blank Sales Territory Card appears
3. Enter all information as necessary
4. Click **Save**

Edit Sales Territory

1. Click Sales Territory from the Sales Territory Search form



2. The Sales Territory Card appears with all information from the Sales Territory that was selected

The screenshot shows a software interface with two tabs: "Sales Territory Search" and "Sales Territory : TERRITORY 1". Below the tabs is a toolbar with three buttons: "Close", "Save", and "Delete". A red arrow points to the "Save" button. The main area is divided into two panels: "Properties" on the left and "Managers" on the right. The "Properties" panel contains three text input fields: "Sales Territory" with the value "TERRITORY 1", "Description" with the value "Illinois and Missouri", and "Country" with the value "USA". The "Managers" panel contains three text input fields: "Last Name" with the value "White", "First Name" with the value "Sean", and "Middle Name" with the value "Sean".

3. Make any edits as necessary, and then click **Save**.

Delete Sales Territory

1. Click Sales Territory from the Sales Territory Search form.
2. Click **Delete** to delete the Sales Territory.

Note: Only Sales Territories not on an open document can be deleted.

This screenshot is identical to the one above, showing the "Sales Territory : TERRITORY 1" form. However, in this version, a red arrow points to the "Delete" button in the toolbar. The "Properties" and "Managers" panels contain the same data as in the previous screenshot.