CRM Sales Territory

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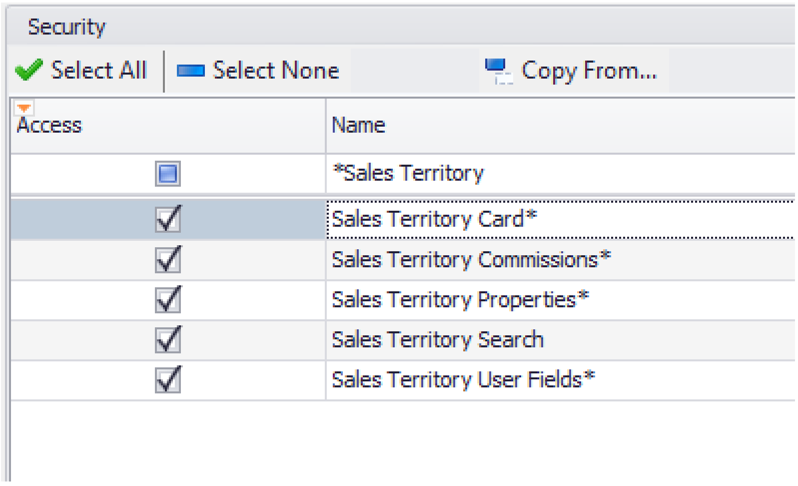
Overview

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



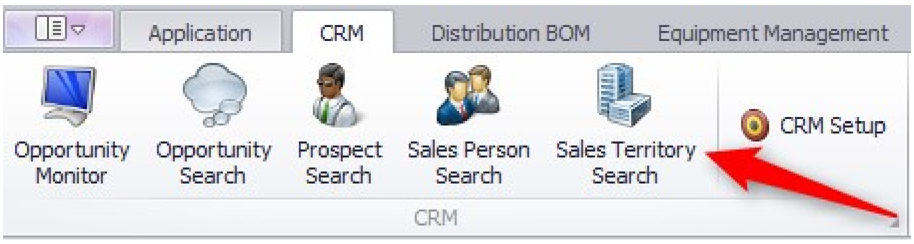
2. Check the boxes to allow access to each form

Note: Set each sub-security, respectively

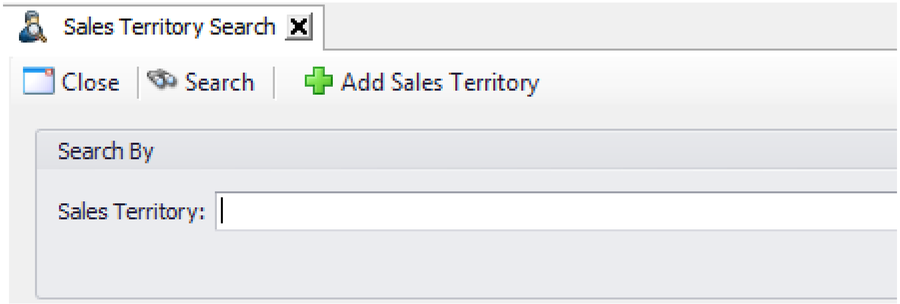
Usage

Sales Territory Search

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



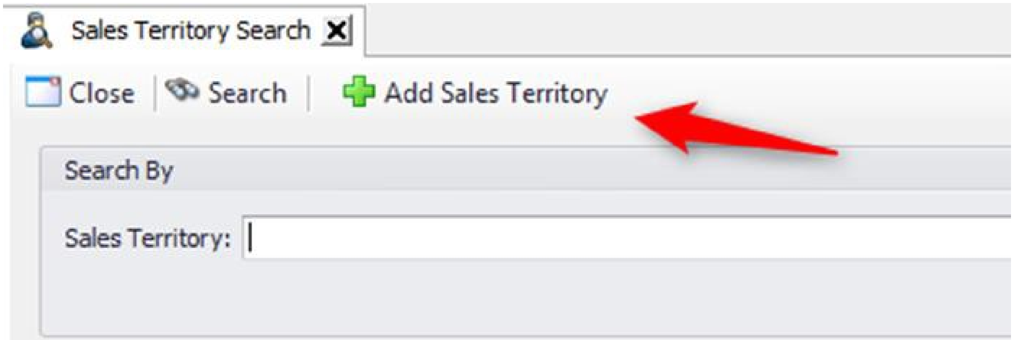
1. Enter text and search to populate the grid with search results



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

Create Sales Territory

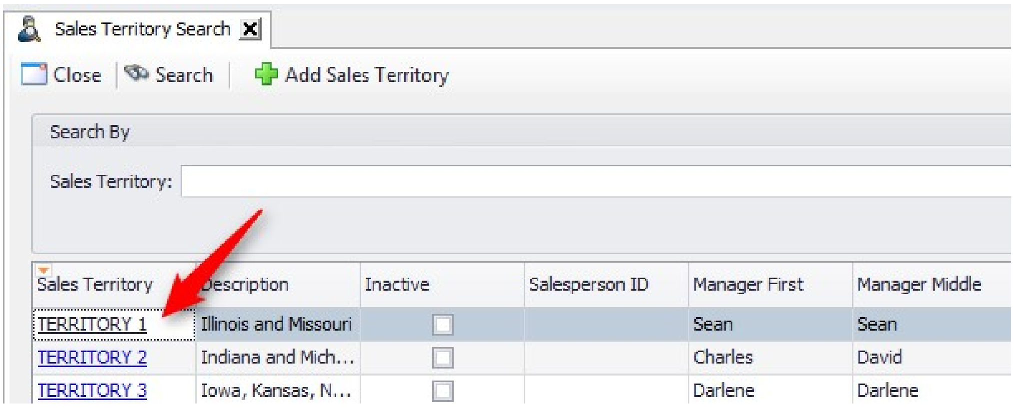
1. Click **Add Sales Territory** from the Sales Territory Search form



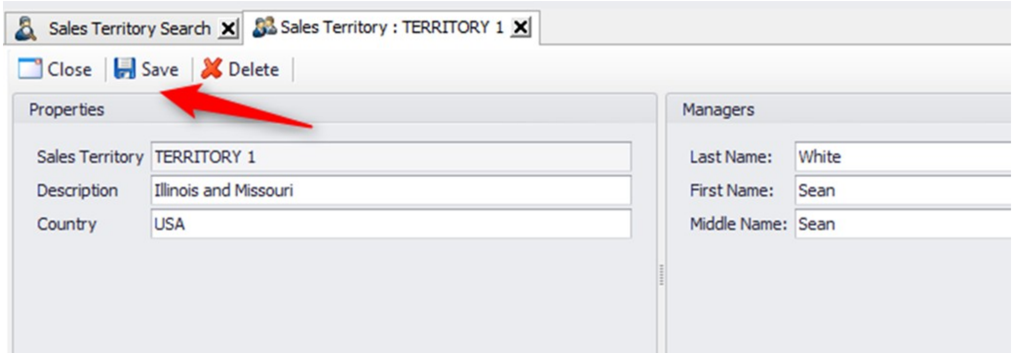
2. A blank Sales Territory Card appears
3. Enter all information as necessary
4. Click **Save**

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



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.