CRM Setup

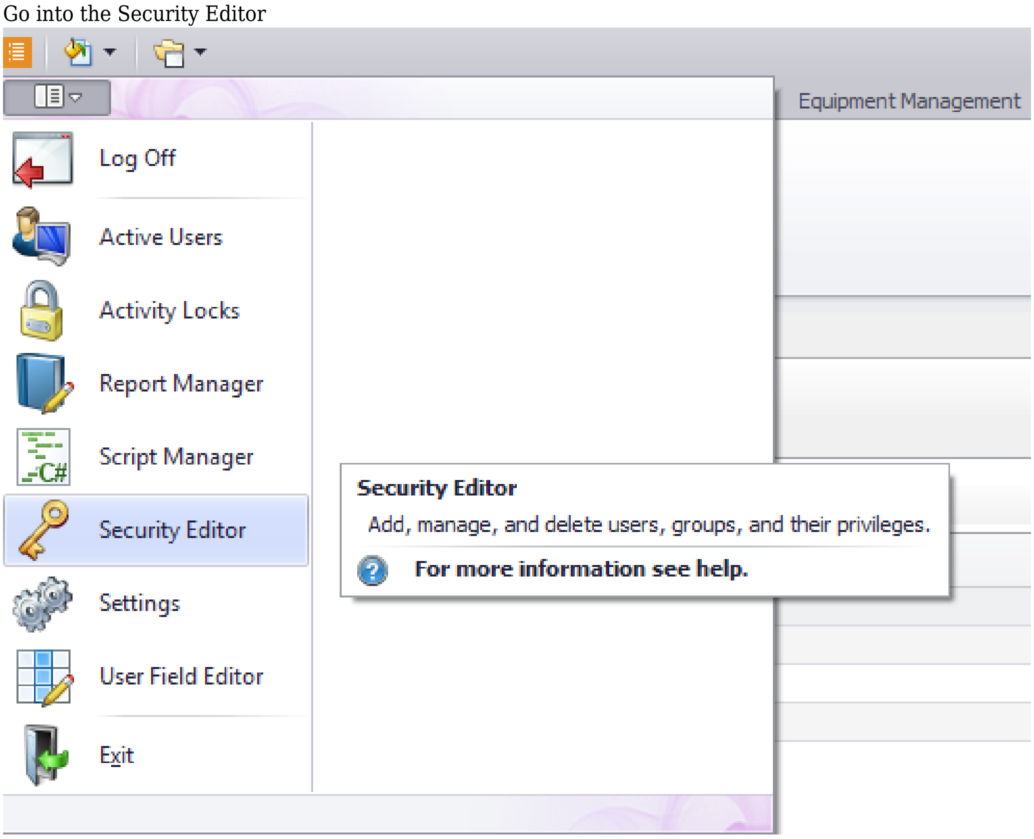
Megan De Freitas - 2025-06-10 - CRM

Overview

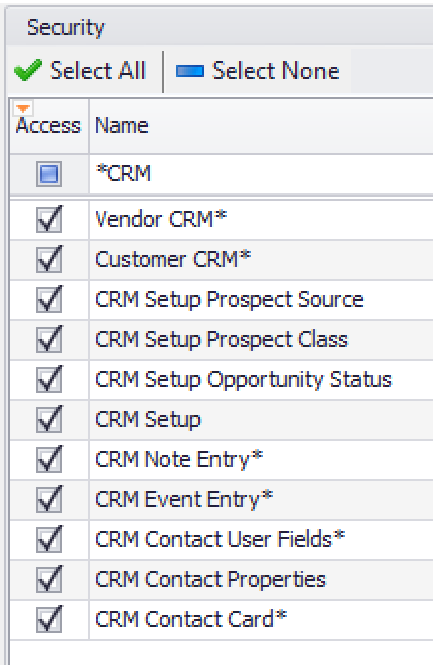
The CRM Module allows you to create and maintain a variety of different business objects. One of components to this module is CRM Setup.

Security

1. Open SalesPad GP
2. Go into the Security Editor



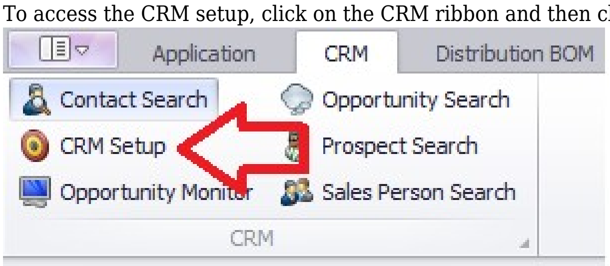
3. Search *CRM



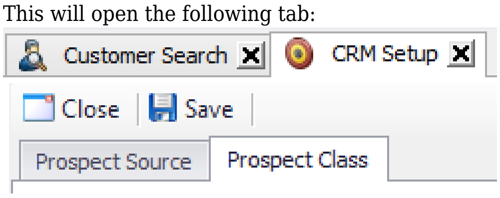
4. Check all of the unchecked boxes relating to CRM

CRM Setup

To access the CRM setup, click on the CRM ribbon and then click **CRM Setup.**



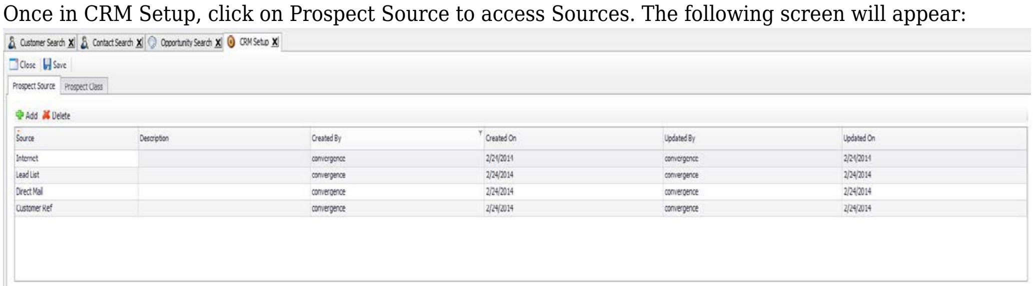
This will open the following tab:



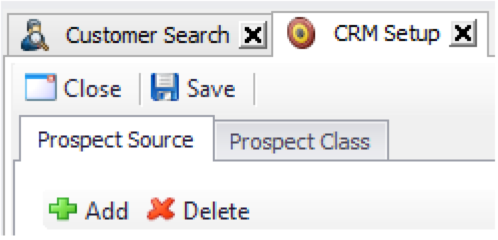
Prospect Source

Once in the CRM Setup, you can access a variety of different business objects such as Prospect Source, Prospect Class, and Opportunity Status. Prospect source allows users to setup new prospect sources from the setup screen.

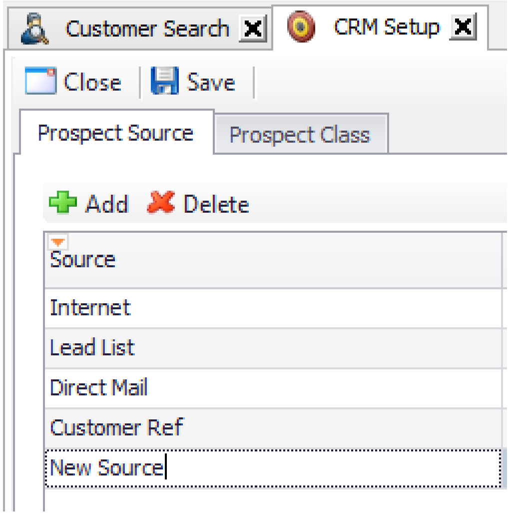
1. Once in CRM Setup, click on Prospect Source to access Sources. The following screen will appear:



2. Click **Add** or **Delete** to make changes to the Source



Clicking **Add** will bring a blank row on the screen. You can enter your data here.



3. To delete sources, click **Delete.**

Prospect Source Terms

Source – Shows where the source of the prospect is coming from.

Description – Text about the source.

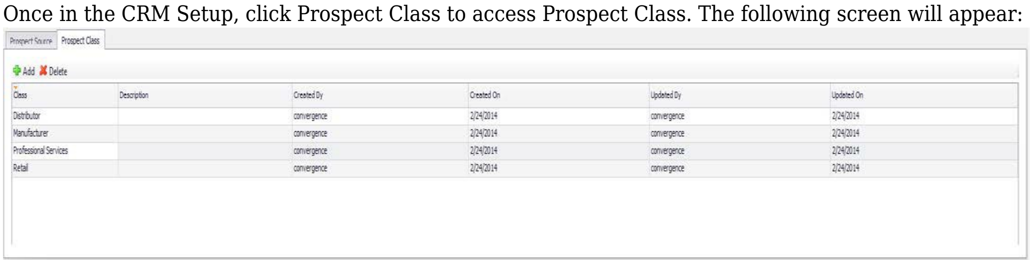
Created By – Shows who made the source.

Created On – Shows when the source was made. *Updated By* – Shows who recently updated the source. *Updated On* – Shows when the source was updated.

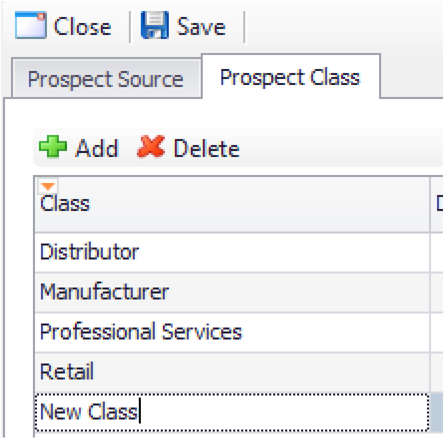
Prospect Class

Prospect class allows users to setup new prospect classes from the setup screen.

1. Once in the CRM Setup, click Prospect Class to access Prospect Class. The following screen will appear:



2. Click **Add** or **Delete** to make changes to different prospect classes. Once you click **Add** the following screen will appear:



3. To delete new classes, hit **Delete**

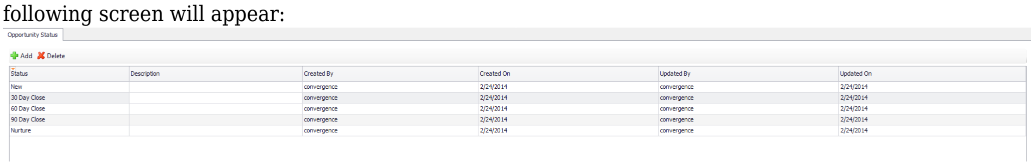
Prospect Class Terms

Class – Houses the criteria for different classes.

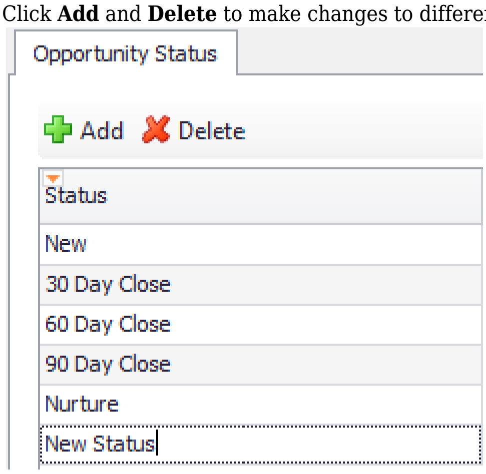
Opportunity Status

Allows users to setup new opportunity statuses from the setup screen.

1. Once in the CRM Setup screen, scroll down to “Opportunity Status” to access Opportunity Status. The following screen will appear:



2. Click **Add** and **Delete** to make changes to different opportunities



3. To delete new statuses, hit **Delete**

Opportunity Status Terms

Status – Tracks the status of different opportunities