

Sales Management

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The Sales Management Module is used to track sales Prospects and create Opportunity (high level quote) records for a sales Prospect. If your company has purchased the QuoteWerks Integration and is using the QuoteWerks software application, Prospects may be used however Opportunities will not be used. Each option within the module is secured by User Group Security permissions.

Opportunities – Selecting this option will display a listing of all Opportunities in process. An Opportunity is what you have quoted to a Prospect; it may list Installation Fees, and Recurring Services - parts are not included. Once a sale is closed and the record is turned into a customer and a job, the opportunity will drop off the list of active opportunities.

Prospects – This option is used to create and manage sales Prospects throughout the sales cycle.

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