

Sales Management Overview and Topics

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The Sales Management modules provides tools for tracking sales leads and the dollar values that have been quoted by using Prospects and Opportunities.

The Prospect is the person or business to whom a Salesperson trying to sell a system or services.

An Opportunity is what the Salesperson is trying to sell to a Prospect. The Opportunity record contains recurring charges, and non-recurring charges.

Note: An Opportunity record does not have the functionality to list the individual parts quoted.

Your company may have an unlimited number of Opportunity records for each Prospect record and track each one separately until sold or lost. If the salesperson is successful in closing the sale with the Prospect, the Prospect's Opportunity record may be turned into a Customer, Site and Job. The application also tracks lost business through the resolution of each Opportunity where the User may record the reason for losing the business and who the competition was for the quote.

Functionality is built in to be able to track significant steps in the sales cycle from beginning to end.

The Prospect record also contains a Qualifications form where your company may capture information related to the Prospect. This form is completely user definable to meet individual company requirements.

If your company has purchased QuoteWerks quoting software, Prospects may be used to gather initial information about the Prospect within SedonaOffice, then push out the information to QuoteWerks to build the quote and present proposals to the Prospect. Once the sale is closed, the information from QuoteWerks is brought back into SedonaOffice to create the Customer, Site and Job record.

For information and instructions on how to use Prospects & Opportunities, follow the topic links below.

[Prospects Overview](#)

[Prospect Flow Charts](#)

[Prospect Queue Definitions](#)

[How to Create a New Prospect](#)

[How to Send a Prospect Record to QuoteWerks](#)

[Opportunities Overview](#)

[Opportunity Queue](#)

[How to Create a New Opportunity](#)

[Closing an Opportunity and Creating a Customer/Job](#)

Closing an Opportunity/Prospect-Lost Sale

