XPANZION
ULTIMATE BUSINESS DESIGNER

ENTERPRISE ACADEMY

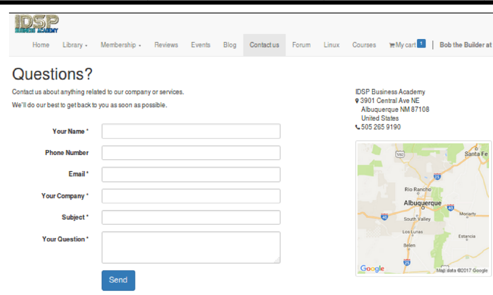
So Your Business Can... Boldly Go Where No Business Has Gone Before!

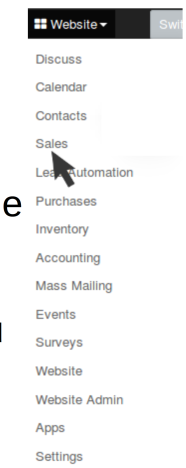
Enterprise Dashboard Training

16-Week Program

- Intro to Sales/CRM

Exercise 3 of 16

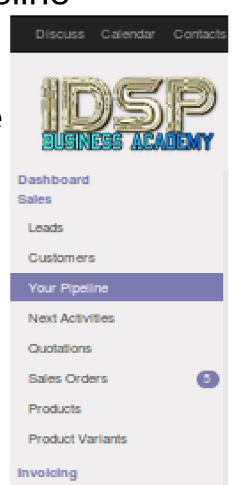


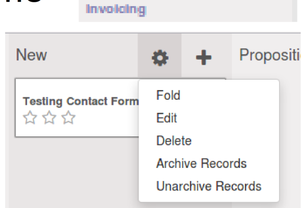


1) Fill out the form on Contact Page
2) Select Website from the upper left & Sales in the pull-down menu
3) Select Leads from the left menu
4) Select the new record

Note: If you do not see your lead, contact the Space-Port-Pros for assistance

5) Click Convert to Opportunity
6) Select your options in popup box
7) Click Create Opportunity – this will add the lead to your Contacts and put them in the beginning of your sales pipeline
8) Select Your Pipeline from the left menu
9) Try clicking and dragging the new card to another column
10) You can set the priority by selecting the star of choice
11) Use the opportunity menu on the card to change colors
12) Select the gear icon at the Top of the column to edit the column and change the name
13) Select Add Column on the far right to add a sales process stage
14) Drag the column to the correct position





Contact Resource Management is vital to an effective sales process.

Track your leads and progress them through your sales process.

Define the stages of your sales process and customize your pipeline.

Color code your opportunities for easy categorization.

Select a priority star rating to keep the highest priority opportunities on top of your sales stages.

Use the opportunity card to keep notes, schedule meetings. This will assist in using Next Activities to know who to contact next.