

CRM

Lead State

Lead Source (e.g. Tradeshow, Cold Calling)

Lead Program (e.g. Product Line, Account Type)

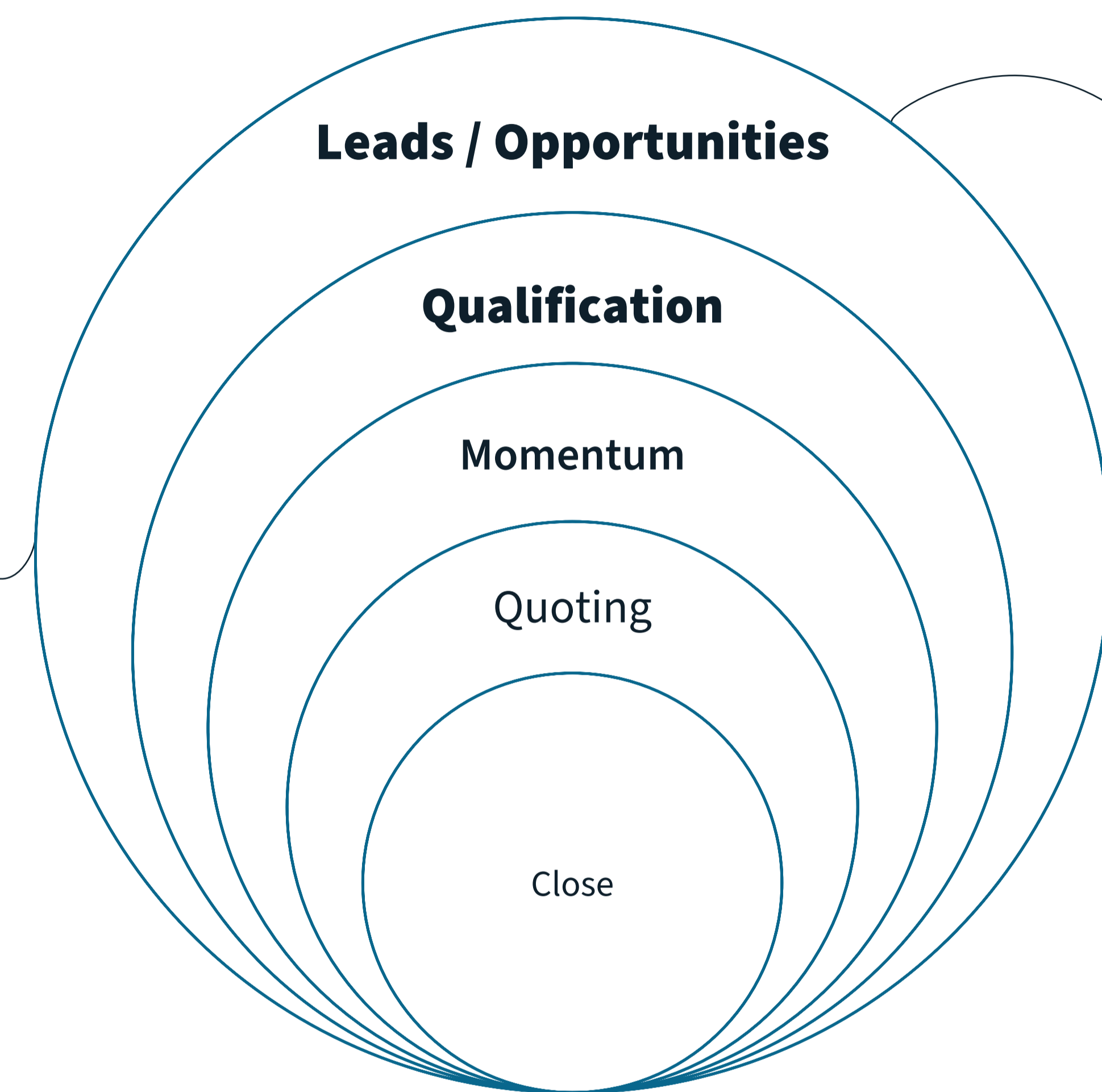
• Projected Conversion Date
• Projected \$ Value Of Winning Account
• Probability Adjustment

Sales Pipeline

Notes / Knowledge Base (Sales Collaboration)

Reminders / Followups
Calendar Integration
"Last Touched" Tracking

Activate As Customer



Customizable Funnel
Assignments / Responsibilities
Email Triggers / Alerts / Reminders
Workflow History

Opportunity State

Opportunity Type (e.g. Product Line)

Opportunity Probability Adjustment

• Projected Sales Quantity
• Projected Unit / Ext. Resale
• Product

Opportunity Pipeline

Notes / Knowledge Base (Sales Collaboration)

Reminders / Followups
Calendar Integration
"Last Touched" Tracking

Activate As Customer

Quote Per Customer Opportunity

Quotes

Quote Workflow State (e.g. Sales, Engineering, Purchasing)

Send Quote PDF To Customer

• Projected Conversion Date
• Projected \$ Value Of Winning Account
• Quote Probability Adjustment

Quote Pipeline

Notes / Knowledge Base (Sales Collaboration)

Reminders / Followups
Calendar Integration
"Last Touched" Tracking

Convert To Order (Track Conversion %) Reconcile Quote (Track Reason Codes)

Customer Service

Customer Record Account Type (Contacts, Addresses, History, etc.)

Documents / Paperwork

Check Status Of Customer Order

Open A Customer Case (Complaint, Feedback, etc.)

Issue An RMA

Track Customer Warranty Information

Re-issue Shipping Docs, Invoices, etc.

Customer Portal

Submit RFQs Order Status
Track Shipments AR Statement