


## 3.6 Potentials

Potentials are starting points for negotiations. The module is organized with filters and information cards. Within the main information, a Potential must be correlated with a Company / Contact (so that the commercial information flow is complete).

The relations menu gives access to the data of related modules. As usual, a relation can be added by pushing the relevant button . For example, from a Potential it is possible to progress to the next stage of the sales cycle by creating a Quotation, which is automatically correlated with the Potential / Account information.

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StatSoft Italia srl

Potential

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Potential Information:

Potential Name

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Amount

1000.00

Tipo Rinnovo

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Assigned To

User > admin.temp

Sales Stage

Prospecting

Expected Close Date

18/03/2010

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Lead Source

-

Related To

Account > StatSoft Italia srl

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EDIT

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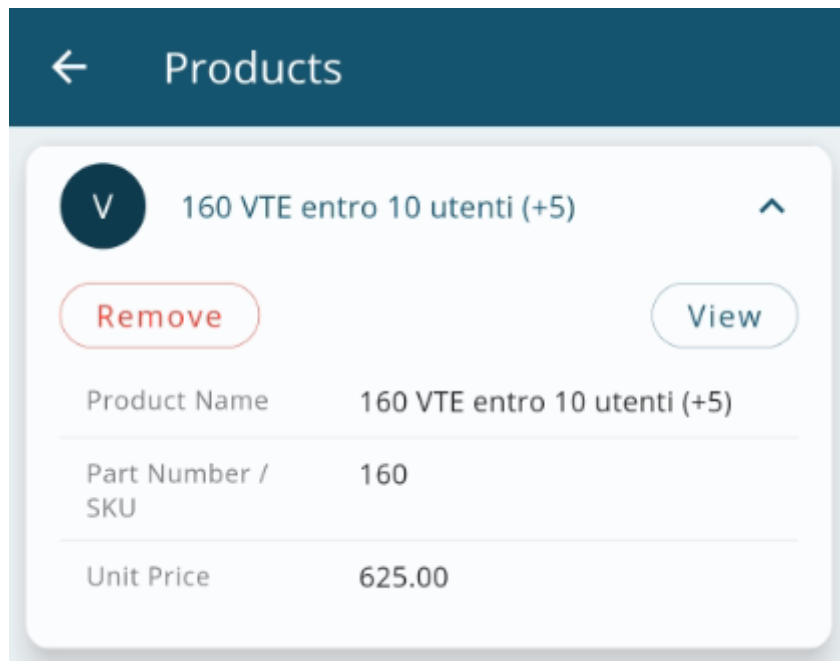
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Potential Detail



*The image above shows a Quotation related to a Potential*

| Organizational layout of related modules |                       |                  |
|--|-----------------------|------------------|
| Conversations                            | Notes                 | PDF Maker        |
| Documents                                | Activities (Calendar) | Tasks (Calendar) |
| Products                                 | Contacts              | Quotes           |
| Sales Orders                             | Services              | Messages         |
| Account                                  | Processes             |                  |

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