


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.

← € StatSoft Italia srl Potential ☆

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Potential Information:

Potential Name
StatSoft Italia srl

Amount
1000.00


Tipo Rinnovo
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Assigned To
User > admin.temp

Sales Stage
Prospecting

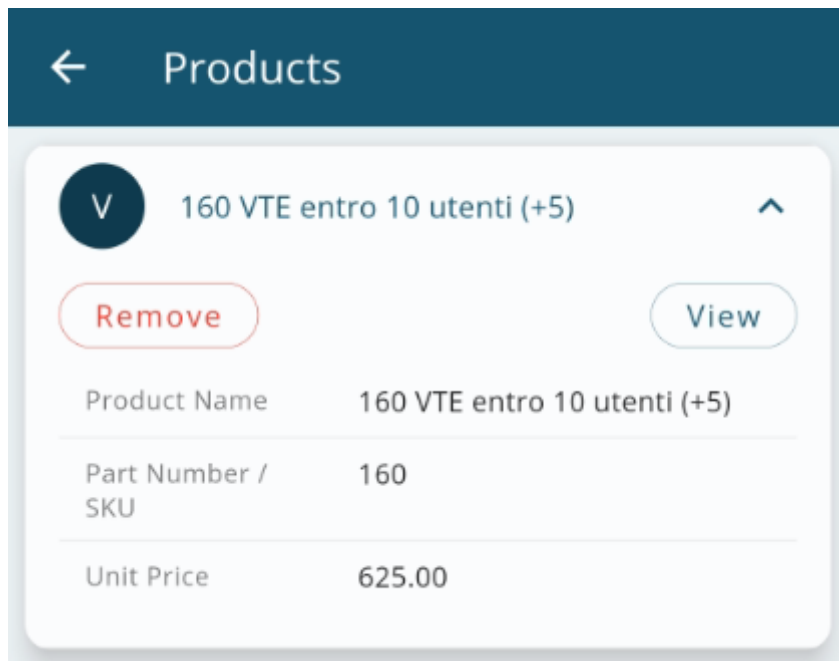
Expected Close Date
18/03/2010 📅

Lead Source
-

Related To
Account > StatSoft Italia srl 

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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	

Revision #2

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