


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

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

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Lead Source

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Related To

Account > StatSoft Italia srl

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EDIT

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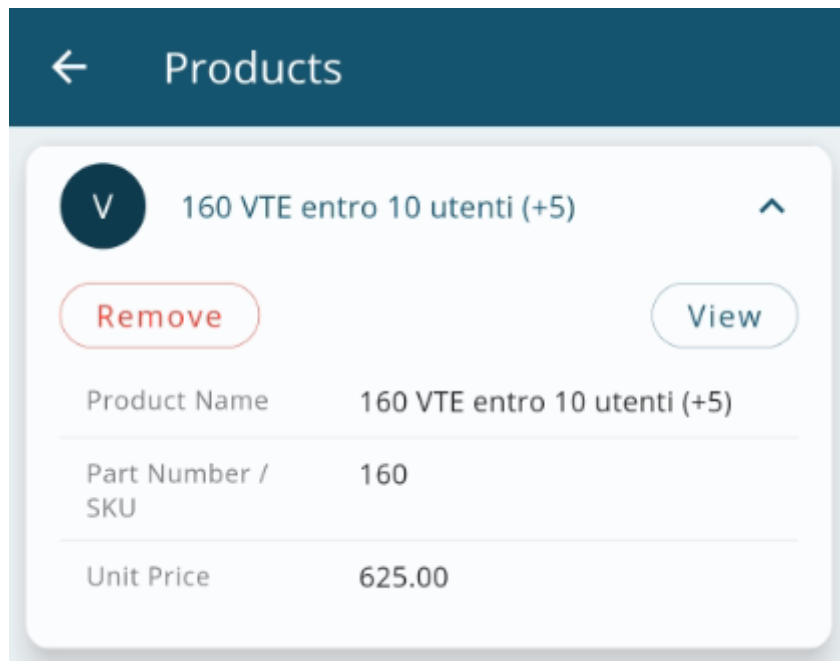
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Potential Detail



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	

Revision #2

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