

## SALESPERSON OVERVIEW

- Today Page
- Dashboard
- Contact Management
- Opportunities
- Marketing Groups

Platinum



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## SALESPERSON TODAY PAGE

- Conversations
- Meetings
- Creating Conversations
- Time Entry

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## SALESPERSON MONITORING

- By Stage
- Neglected
- Sales Goals
- Favorite Opps
- Social Media Feed

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## SALESPERSON IMPLEMENTATION

### Contact Management

- Leads
- Contacts/Companies

### Conversations

- Follow-up

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## SALESPERSON OPPORTUNITY MANAGEMENT

### Create an Opportunity

- Stage and Status
- Sale Amount
- Advance Features

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## SALESPERSON OPPORTUNITY MANAGEMENT

### Next Step Activities and Meetings

#### Using Advanced Feature

- Project
- Campaign

#### Opportunity Conversion

#### Update Opportunity Status

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## SALESPERSON IMPLEMENTATION

### Marketing Groups

- Setting up Marketing Groups
- Mass Updating Multiple Leads / Contacts to Marketing groups
- Create Contact Note

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