

# **SALES TEAM CRM**

**Log In**

**Username:**

**Password:**

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

Image

Hi, [name], welcome to your dashboard

Recently Created Accounts



Recently Created Opportunities



Recently Created Contacts



# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Accounts List View:

- Account A
- Account B
- Account C
- Account D
- ...

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Account A

Created on xxxxxx by xxxxxx

## Opportunities (x in total)

## Contacts (x in total)

## Notes

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Opportunities List View:

- Opportunity A
- Opportunity B
- Opportunity C
- Opportunity D
- ...

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Opportunity A

Created on xxxxxx by xxxxxx

## Status

## Products & Value

## Related To:

[Account]

[Contacts]

## Notes

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Contacts List View:

- Contact A
- Contact B
- Contact C
- Contact D
- ...

# SALES TEAM CRM

Dashboard - Accounts - Opportunities - Contacts

## Contact A

Created on xxxxxx by xxxxxx

## Status

## Associated Opportunities

## Associated Accounts

## Notes