**Lead**

1. Lead Creation/Add Lead
2. Quick Creation of Lead
3. Import Lead
4. Lead Management

* Edit Lead
* Summary
* Details
* Updates
* Calendar
* Emails – Configurable Currently? – Email Config is working for Leads from Admin Profile & Manager Profile, Supervisor. Sales Persona won’t be able to send emails.
* Doc
* Campaign - NA
* Services
* Comments
* Follow Lead
* Convert Lead
* Delete Lead
* Add Event
* Add Task

1. Customization Menu – Applicable?

**Organization**

1. Add Org
2. Quick Creation of Organization
3. Import
4. Org Management

* Edit Org
* Summary
* Details
* Updates
* Contacts
* Opportunities
* Quotes
* Invoices
* Activities
* Emails
* Doc
* Service Contracts – Applicable?
* Campaigns – NA

**Opportunities**

1. Add Opportunity
2. Quick Creation of Opportunity
3. Import
4. Opportunity Management

* Edit Opp
* Summary
* Details
* Updates
* Activities
* Contacts
* Documents
* Quotes
* Services
* Comments
* Delete Opp
* Duplicate
* Create Invoice
* Create Quote
* Add Event
* Add Task

**Quotes**

1. Create Quotes
2. Import Quotes
3. Quote Management

* Summary
* Details
* Updates
* Activities
* Docs
* Delete Quote
* Duplicate Quote
* Export to PDF
* Send Email with PDF
* Generate Invoice

**Dashboard**

Dashboard Management

**Contact**

**Users & Roles**

Admin Login>> User Sharing Rules>> Provides Salesperson access