

Opportunities

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Opportunities - Create CRM Definition

If you want to create CRM Tasks for the Opportunities, please switch to the Type [Tasks & CRM](#).

If a query must be completed when closing an Opportunity, it must be created with the ID "CLOSE". This means that an Opportunity can only be Completed if the query is filled out and Completed with (1).

< VERKAUFSCHANCE ABSCHLUSS QUERY

Seite 1

Dies ist der für den Abschluss des Prozesses erforderliche Part.

Bitte geben Sie eine irgendwas ein *

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SPEICHERN

ABSCHEIDEN

Opportunities - Evaluation

An evaluation of the opportunities from the last 12 months can be found in the backend under Evaluation - STATISTICS - Opportunities.

The report can be exported.

Sales Pipeline - Opportunities

Under Sales pipeline → Opportunities you will see a summary of the sales processes (code table "Opportunities Sales process") with the column "Activated E-Mail Templates".

Activate E-Mail Templates

You select a sales process from the list. In the Assistant, you specify via checkbox which centrally maintained e-mail templates are available for selection in the client in the widget "E-Mail" for opportunities of this sales process.

How to create an e-mail template can be found under [Settings - E-Mail Templates \(Opportunities & Leads\)](#).

Release

From version 21

1. New function: Activation of e-mail templates per sales process for the opportunities widget "E-Mail".