Overview

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The Sales Automation tool allows your team to track and automate repeatable sales actions from identifying a lead to converting a proposal into a job. Sales Automation monitors the status of leads throughout the sales workflow, so no one is forgotten about. It also automates follow up actions allowing your sales team to focus their time converting leads to customers. This tool tracks important steps throughout the lead management process, managing stages and the cycle of proposal, and has built-in quoting capabilities.

Before your first login, our support team can walk you through the full workflow of how to use the Sales Automation tool. They will review the features and functions including creating leads, proposals, custom fields, utilities, employees, users, preferences, and more.