

CRM - User Guide (Lightning Version)



CRM First Steps

- Introduction to CRM
- Navigation & Chatter



Sales Processes

- Account & Contact Management
- Visit Report
- Opportunity Management
- Quote Management
- Competitive Insights Management
- Account Plan Management
- Sales Reporting & Analysis
- Lead Management
- Contract Management



Service Processes

- Complaint Management
- Sample Request Management
- Customer Request Management
- Customer Specific Requirement

Other Processes

- NPS - Voice of the Customer
- Mobility

(Obsolete) [Commercial Roadmap](#)

(Obsolete) [Transactional Pricing](#)

[Market Segmentation](#)

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