Sales Pipeline And Opportunity Settings

This article applies to:

Max Classic

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The sales pipeline defaults determine how Max Classic behaves when an opportunity is created automatically. An active stage is one where a sales rep is engaging with the prospect and you want to protect the "lead" for that sales person. Defining active sales stages gives you the ability to prevent a duplicate opportunity from being created and assigned to another sales rep.

1. Go to **CRM > Settings** in the main navigation menu.
2. Click on **Opportunity Defaults** in the Settings menu.
3. Active Sales Stages:
   - **Active Sales Stages**: Hold down your Ctrl key and click on the names of the active sales stages. The active stages are used as criteria for automatically creating a new opportunity. This setting will prevent a duplicate active opportunity record from being created and assigned to a different sales rep.
   - **Default Stage**: This stage will appear in the *Put In Stage* field by default, however, you can change this when setting up your automated sales pipeline campaign.

4. Win and Loss Stages
   The reasons prospects buy from you is information you can use to refine your sales and marketing strategy. You can proactively address common objections (loss reasons) and reinforce strengths (win reasons) throughout the lead nurture and conversion process. It can also help lead to product and service changes that make your company more attractive than your competition. The win/loss data is stored in individual opportunity records and can be used in opportunity searches (CRM > Opportunities.)
   1. Select your **Win Stage** from the drop-down and enter a list of known Win Reasons. You can add more later, if needed.
   2. (Optional) Select **Yes** to require a win reason when a sales person moves the opportunity to the Won stage. When a sales rep moves an opportunity record to this stage, the win reasons will show up in the opportunity record. If you require a win reason, the sales rep won't be able to save the opportunity until they select a reason from the list.
   3. Select the **Loss Stage** from the drop-down and enter a list of known Loss Reasons. Select **Yes** to require a loss reason when moving the opportunity to this stage.

5. Viewing Opportunities
   You can set up sharing rules that will refine a user's ability to view contact records and opportunity records. The user who "owns" the contact record may be different than the sales rep assigned to an opportunity for that person. These rules determine how those records are shared when this is the case. These are set to *Yes* by default, but you can change these defaults.
   - **Assign to group**: This controls the user list that shows up when a new opportunity is created. In most cases, this should be the sales rep group.
   - **Share Contact When Shared**: This setting automatically enables a user's ability to view a contact

record that they don't "own" when an opportunity for that person is shared with them.
    - **Share Contact When Assigned**: This setting automatically enables user's ability to view a contact record that they don't "own" when an opportunity for that person is assigned to the user.
    - **Unshare Contact When Unshared**: This setting automatically disables a user's ability to view a contact record when they can no longer view any opportunity records for that person (the opportunity record is unshared.)
    - **Unshare Contact when Unassigned**: This setting automatically disables a user's ability to view a contact record when they are no longer assigned to any opportunity records for that person (the opportunity record is reassigned.)
    - **Sync Opportunity and Contact Owners**: This setting automatically changes the contact record owner when a new opportunity record is created. The sales rep who is assigned to the opportunity will become the owner of the contact record too.
    - **Sync Owner of Closed Leads**: This setting works in conjunction with the sync opportunity and contact owners setting. In addition to reassigning the contact record to the sales rep, it will also reassign all of the old, closed leads to that user.

6. Buy Now

   There are several buy now link default settings you can configure to streamline the order processes and to trigger automation.

   Buy Now Default Expire Days. The number of days you enter here will be the default for every buy now link, but the sales rep can change this from the products/subscription Interest tab in an opportunity record.
    1. Select a Buy Now Shopping Cart Skin. This defines the look and feel of the shopping cart prospects see when they purchase through a buy now link.
    2. (Optional) **Buy Now Win Reason**. This reason will be assigned to an opportunity record automatically when a prospect purchases.
    3. The buy now link is a trigger. Click on the Actions button to automate something when this happens.
        - **Clicked Buy Now**: You might use these actions to apply a tag (e.g. Buy Now Click) and send an email to notify a sales rep that the buy now link was clicked.
        - **Purchased via Buy Now**: You might use these actions to apply a tag (e.g. Buy Now Purchase) and send an email to notify the sales rep that the customer purchased. You might even trigger a follow-up sequence specific to people who clicked on the buy now link.

7. Click **Save.**