Webinar - Tips for a Strong Sales Cycle

Last Modified on 04/08/2021 2:43 pm EDT

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Webinar Follow-Up:

Tips for a Strong Sales Cycle

- **The webinar video is up!**
  - **Check it out here**

- **In this webinar you will learn about the following topics:**
  - **Lead Tracking**
    - **Lead Information**
    - **Custom Fields**
  - **Quick Review of the Order Time Sales Cycle**
  - **Quotes**
    - **Quote Statuses**
    - **Approving and Converting a Quote to a Sales Order**
  - **CRM Features**
    - **Quick Primer on Email Templates for Marketing or reaching out to a prospect**
    - **Alerts for Quote Approval**
  - **Watch until the end for the tutorial on adding fields to your Lead Details and Lead Editor Screens + Helpful information about Email Templates with Personalization Tokens.**

- Helpful Resources related to the webinar:
  - **Order Time Sales Cycle**
  - **Lead Statuses**
  - **Customer Types**
  - **Why can't I add customer types in Order Time (QBO)?**
  - **Set up and assign customer types in QuickBooks Online**
  - **Sales Reps**
  - **Generate a Quote**
  - **Create Quote Statuses**
  - **How to Set Up Approval Alerts**
  - **Video - How to Set Up Approval Alerts**
  - **Custom Fields & Calculated Fields**
  - **Webinar - Custom & Calculated Fields**
  - **Creating Custom Email Templates (With a Video)**
- **Tim Grant's Info**
  - **Website: https://businesssp.com/**
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  - **Contact Form for help with QuickBooks and adding services: https://info.ordertime.com/quickbooks**