AMPED Terminology

Module – Any accessible page from the left menu or admin settings (only available for site administrators) in Amped. Ex.: Calendar Module, Leads Module, Opportunities Module, Analytics Module, etc.

Leads – A lead is any person that could be interested in the products or services you sell. A lead could be a person that completes your website contact form or that you have met at a conference or networking event. A lead must be qualified by a member of the sales team to determine if there is a valid opportunity for a sale. Once the lead is qualified, the lead can be converted which automatically creates three new records: an account, a contact, and an opportunity.

Accounts – An account is an organization, company, or individual. An account can be a customer, competitor, vendor, partner or any other entity you may wish you track. The account record displays all records of sales, contacts, and interactions or touch points with the company. This includes closed and open opportunities, contacts, and records of past or scheduled interactions.

Contacts – A contact is a person that works for the organization or company (Account) that you are tracking. The contact record will allow you to maintain relevant information for the individual such as phone numbers, emails, and address, title, and role in your sales opportunities with the account.

Opportunities – An opportunity is a potential sale. The opportunity record will allow you to document all relevant information to closing a deal including expected close date, sales stage, forecasting information, as well as opportunity amount. The Opportunity record is always related to an account record, and can also be tied to a contact, campaign, or specific activity for additional tracking purposes. The opportunity and the contact are at the center of your sales process.

Campaigns – A campaign record can represent a marketing initiative or business expenditure you would like to track. Lead and contact participation can be tracked via the campaign. Opportunities also have a close relationship with campaigns and allow the user to track how much money was made from the campaign or initiative.

Activities – An activity can be a call, meeting event, task, email or SMS. These records allow you to track every customer interaction and touch point.