Stop Investments

Last Modified on 09/15/2016 7:00 am EDT

Stop Investment

Stop Investments help you identify those areas in which your current resource investment is not paying off and to work in conjunction with the account to cut back in those areas. Stop Investments refer to any business situation where you have been dedicating time, effort, people, or other resources, and the investment, as your team calculates it, is not paying off.

Fig. 60, Stop Investments section

To add a Stop Investment for a Goal:

1. In the Goals section, click the Add icon to open the Goal section.

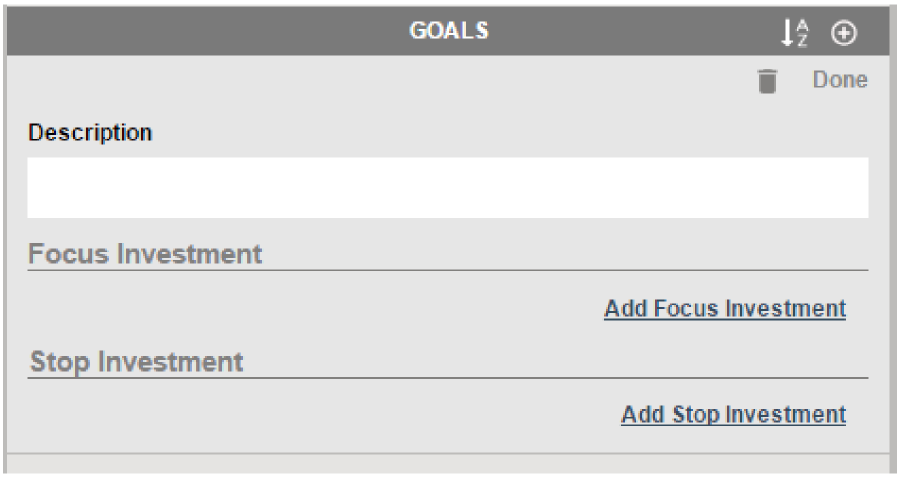

Fig. 60a, Goal section, open

2. Click on Add Stop Investment. A side panel will open to allow you to enter a Stop Investment:

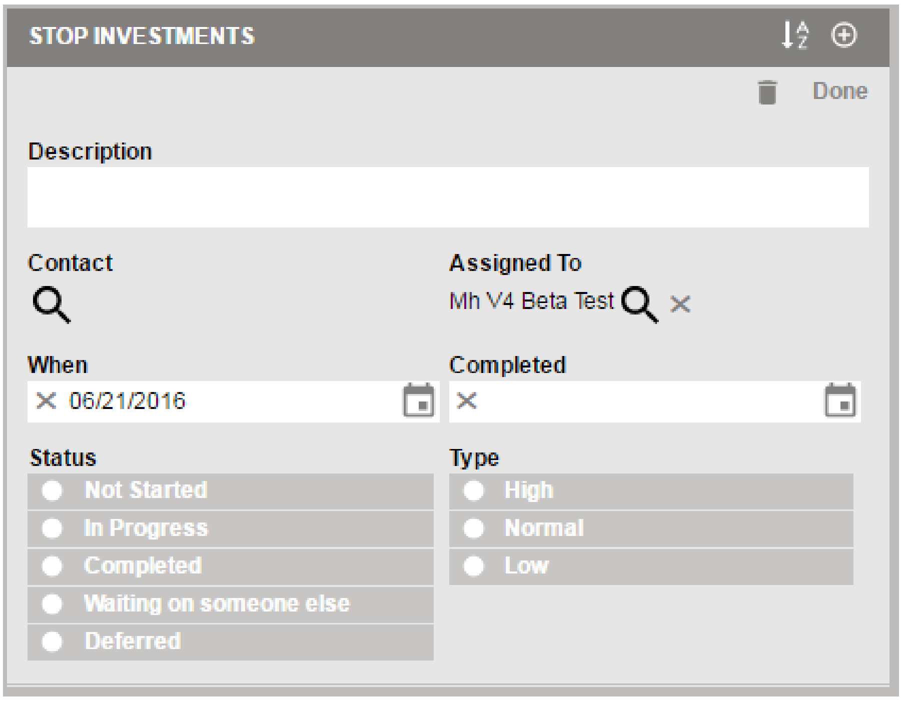

Fig. 60b, Stop Investments section, open

The following are descriptions of the fields in the Stop Investment section of the dialog:

Description - the text description of the Stop Investment. Type directly into the text field.

Contact - an Account contact who may have input on the Stop Investment. Use the Search tool to select a contact.

When - the date the Stop Investment item was created. Use the calendar tool to select the desired date.

Assigned To - the person within your organization that will be responsible for the Stop Investment item. Use the Search tool to select the assignee.

Completed - the date the Stop Investment item was completed. Use the calendar tool to select the desired date.

Status - the status of the Stop Investment item. The values of this field may vary according to your SAM installation. Select the radio button corresponding to the desired Status.

Type - the priority of the Stop Investment item. The values of this field may vary according to your SAM installation. Select the radio button corresponding to the desired Type.

3. Type a description of the Stop Investment in the **Description** field.

4. To assign a Contact, click the Search icon in the **Contact** field and do one of the following:

- If the desired name appears in the list, select the name and proceed to step 7.

- If the desired name does not appear in the list, select the Search tab and proceed to step 5.

5. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Go**.

6. From the list of items that match the search criteria, select the desired contact tp populate the contact name.

7. Complete the other fields as desired.

8. When you have completed entering the desired data, click **Done** to save and close the section or click the Add icon to add another Stop Investment.

To Add a Stop Investment that is not associated with a goal:

In the Stop Investment section, click the Add icon to open the Stop Investment section. Follow steps 3 through 8 above.