SHERKETY BYTES ALIGN

Exploring Sales Pipeline and Customer Management Workflows

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Working from the Sales Dashboard and CRM Workspace

In Sherkety ERP & Website Platform, the Sales and CRM workflow is centered around a small set of connected screens: the CRM pipeline, customer records, and quotations. If you already reviewed the business value of this module in Understanding Sales and CRM Module Value for Revenue Teams, this section focuses on how the day-to-day work actually moves across those screens.

Most users begin in the CRM area, where open leads and opportunities are shown in a stage-based pipeline. The most visual layout is the kanban view, where each column represents a sales stage and each card represents one deal. This view is useful when you want to see what is new, what is moving forward, and what has stalled. You can also switch to a list view when you need to sort, scan, or filter records more precisely.

The first records sales teams usually work with are:

- Leads for new incoming prospects
- Opportunities for qualified deals
- Contacts for people and companies
- Quotations for formal offers

Across these screens, the main controls stay familiar. Look for buttons such as **Create** to add a new record and **Edit** to update an existing one. In the pipeline, you can drag a card from one stage column to another to reflect progress. Inside a lead or opportunity form, you can review customer details, notes, expected revenue, and planned next steps in one place.

Activity planning is also part of the same workflow. From the record form, sales reps can schedule follow-up actions such as a call, meeting, or reminder so the next step is visible without leaving the deal record.

[SCREENSHOT: CRM pipeline with kanban columns, Create button, and an open opportunity form showing customer details and scheduled activity area]

Capturing Leads and Turning Them into Qualified Opportunities

A typical workflow starts with a new lead in the CRM pipeline. In Sherkety ERP & Website Platform, you create that record directly from the pipeline so the prospect enters the team’s working queue immediately.

1. Open the CRM pipeline and click **Create**.
2. Enter the lead’s basic details. Start with the lead title, then fill in customer information such as customer name, email, and phone number.
3. Add sales details that help with prioritization, including expected revenue if that information is already known.
4. Assign the lead to the appropriate salesperson so ownership is clear from the start.
5. Save the record and review it from the lead form.

Once the lead is saved, the qualification process happens inside the same record. Update the pipeline stage as you learn more about the prospect. Add notes from calls, meetings, or email conversations directly on the form so anyone reviewing the record can understand the current situation without searching elsewhere. This is especially helpful when leads are handed from one salesperson to another.

Ownership matters early in the process. If incoming leads are shared across a team, use the salesperson assignment to route each prospect to the right person. That keeps follow-up tasks, quotations, and communication tied to one owner instead of being scattered.

When the prospect is ready for active sales work, move the lead forward by converting it into an opportunity. This keeps the existing history attached to the record, including notes, ownership, and customer details already entered during qualification. Instead of re-entering information, the sales team continues from the same workflow with a clearer focus on closing the deal.

[SCREENSHOT: New lead form with lead title, customer details, expected revenue, salesperson assignment, and stage selector]

Managing Contacts and Keeping Customer Records Up to Date

Customer records are the shared reference point for the entire sales cycle. In Sherkety ERP & Website Platform, keeping contacts current helps your team avoid repeated data entry and makes sure quotations and follow-up actions use the right customer details.

You will usually create or update a contact while reviewing a lead or opportunity. If the prospect is a new company or person, add a fresh customer record. If the customer already exists, update the existing record instead of creating another one. This is especially important when multiple salespeople work with the same company.

The most useful contact details to maintain are:

Field	Why it matters
Company name	Identifies the business tied to the deal
Contact person	Shows who the salesperson is speaking with
Email address	Supports quotation delivery and follow-up
Phone number	Helps with calls and urgent outreach
Sales-related notes	Keeps context such as needs, objections, or preferences

A well-maintained contact record connects naturally to other sales work. When a quotation is created from an opportunity, the customer information can carry over instead of being typed again. Scheduled activities also stay tied to the same customer history, making it easier to see what has happened so far and what still needs attention.

Use an existing contact when the lead belongs to a customer already in your records, even if the deal is new. Create a new contact only when the person or company is genuinely new to your team. Before adding a new record, compare the customer name, email address, and related opportunities. That quick check reduces duplicate contacts and keeps reporting cleaner.

[SCREENSHOT: Customer record showing company name, contact person, email, phone number, and notes linked to an opportunity]

Moving Deals Through Pipeline Stages

The pipeline is where sales progress becomes visible. In Sherkety ERP & Website Platform, each opportunity appears as a card inside a stage column, allowing the team to track movement from early interest through negotiation and final outcome.

1. Open the CRM pipeline in kanban view.
2. Find the opportunity card you want to update.

3. Drag the card into the next stage column when the deal advances.
4. Open the opportunity to update important details such as expected revenue, closing date, and salesperson.
5. Save the record so the latest status is reflected across the team.

This drag-and-drop workflow gives an immediate picture of deal health. If one column is filling up with older opportunities, that often signals a bottleneck. Managers can quickly spot where deals are slowing down, while sales reps can focus on records that need action before they go cold.

The stage itself is only part of the update. As a deal moves forward, review the supporting details on the opportunity form. Expected revenue may change after discovery calls. The closing date may need adjustment based on the customer's timeline. Ownership may also shift if a different salesperson takes over the account. Keeping these fields current makes the pipeline more reliable for planning and forecasting.

A clean stage progression also improves visibility beyond the individual rep. Team leads can review active opportunities by stage, compare likely outcomes, and understand whether enough deals are moving toward closing. When opportunities are updated consistently, the pipeline becomes more than a list of deals—it becomes a working forecast of future sales activity.

[SCREENSHOT: Opportunity cards being dragged between pipeline stages, with visible revenue and activity indicators on each card]

Creating Quotations from Opportunities

Once an opportunity is ready for a formal offer, create the quotation directly from that sales record. In Sherkety ERP & Website Platform, this keeps the quotation connected to the deal, so the team can track commercial progress without breaking the workflow.

1. Open the opportunity that is ready for pricing.
2. Start a new quotation from that opportunity.
3. Confirm the customer details before continuing.
4. Add the products or services being offered, then enter quantities and pricing.
5. Set the quotation validity information and save the document.

Before sending or reviewing the quotation, check that the customer information is complete and accurate. If the opportunity is linked to the correct contact or company record, the quotation will reflect that relationship and reduce re-entry. This is one of the main benefits of keeping contact records clean during qualification.

The quotation form usually brings together the commercial details buyers expect to see. Review the customer name, offered items, quantities, prices, and validity period carefully. These details often change during negotiation, so it is common to reopen the quotation and update it as discussions continue.

Quotation progress should be read together with the opportunity stage. For example, a deal in negotiation may have an active quotation that is still being revised. If the customer accepts the offer, the quotation becomes the bridge from CRM activity into the more formal sales process. That means the sales team does not need to rebuild the deal from scratch after the customer is ready to proceed.

If you want a deeper explanation of quotation handling and follow-up around offers, see Understanding Quotations Automation and Follow Up.

[SCREENSHOT: Quotation form opened from an opportunity, showing customer details, line items, quantities, pricing, and validity information]

Automating Follow-Ups and Staying on Top of Sales Activity

Follow-up discipline is what keeps a healthy pipeline moving. In Sherkety ERP & Website Platform, scheduled activities on lead and opportunity records help sales reps plan the next action instead of relying on memory.

1. Open a lead or opportunity record.
2. Add the next activity, such as a call, email, meeting, or reminder.
3. Set the due date and save the activity.
4. Return to the pipeline to monitor which deals have upcoming or overdue actions.
5. Update the activity after completion and schedule the next step if the deal is still active.

This workflow creates a visible rhythm for each deal. Rather than leaving a prospect in the same stage with no action planned, the record shows what should happen next and when. That is especially useful for opportunities in qualification, proposal review, or negotiation, where delays often happen between customer responses.

Activity indicators on pipeline cards help sales reps prioritize quickly. A card with an overdue task deserves attention before one with a future reminder. On the record form, the activity area gives more context by showing what has been planned and what still needs completion. Used consistently, these indicators turn the pipeline into an action list, not just a status board.

Follow-up planning also connects naturally to contact and quotation history. A salesperson can review the customer record, see the current opportunity, check whether a quotation has already been created, and schedule the next call or email from the same workflow. That creates a more complete customer timeline and reduces the chance of missed handoffs or repeated questions.

For broader reporting on sales performance and pricing views, refer back to Reviewing Sales Reporting and Pricing.

[SCREENSHOT: Opportunity form with scheduled call and meeting activities, plus pipeline cards showing overdue and upcoming activity indicators]

Fixing Common Pipeline and Customer Management Issues

Most sales workflow problems in Sherkety ERP & Website Platform come from missing ownership, incomplete customer records, or next steps that were never scheduled. When something looks wrong, start by checking the record itself before creating a replacement or moving the deal manually.

If a lead is not progressing, review these items first:

- Confirm that a salesperson is assigned
- Check the current pipeline stage
- Open the record and see whether a next activity has been scheduled
- Read the latest notes to make sure qualification details were actually recorded

If a quotation is missing customer details, go back to the linked opportunity and verify that it points to the correct contact or company record. A quotation created from the wrong customer record will carry that mistake forward. Correcting the customer link before continuing usually prevents duplicate cleanup later.

Missed follow-up tasks often show up directly in the pipeline. Look for overdue activity indicators on the opportunity card, then open the record to confirm whether reminders were created properly. If the activity area is empty, the deal may have been moved through stages without scheduling the next action.

Duplicate customer records are another common issue. Before creating a new contact, compare:

- Contact name

- Company name
- Email address
- Linked opportunities or quotations

If you find an existing record with matching details, update that one instead of adding another. This keeps the customer timeline together and avoids confusion when quotations, notes, and activities are reviewed later.

When the issue is less about the sales record and more about what you see on screen, the guidance in Understanding Loading Placeholders Empty States and Errors and Responding to Missing Content and Retry Messages can help you recognize whether you are dealing with missing data, an empty view, or a temporary loading problem.

Overview

Sales work in Sherkety ERP & Website Platform is most effective when leads, opportunities, contacts, quotations, and scheduled activities are treated as one connected workflow rather than separate tasks. The CRM pipeline gives you the stage-based view of progress, contact records provide the shared customer profile, quotations capture the commercial offer, and activity planning keeps each deal moving.

The practical pattern is straightforward:

- Create the lead with complete customer details
- Assign the right salesperson early
- Qualify the record and update its stage as conversations progress
- Reuse or update the correct contact record instead of creating duplicates
- Generate quotations from the opportunity so the sales trail stays connected
- Schedule the next action before leaving the record

When teams follow that pattern consistently, pipeline visibility improves for everyone. Sales reps know what to do next, managers can see where deals are slowing down, and customer information stays aligned across conversations and quotations. This is the operational side of the value described earlier in Understanding Sales and CRM Module Value for Revenue Teams, but focused on the screens and actions your team uses every day.

If you are ready to move from workflow understanding into decision-making, continue with Reviewing Sales and Crm Pricing and Evaluation Actions, which covers how to assess package fit and next-step options for the Sales and CRM module.