SHERKETY BYTES ALIGN

# Lead to Invoice: The Full Customer Journey

August 25, 2026

## Overview

In **Sherkety ERP & Website Platform**, this workflow begins when a potential customer shows interest and is recorded as a lead, then moves through **Sales & CRM**, sales follow-up, quotation approval, order confirmation, and finishes with a customer invoice in **Accounting**. The main modules involved are **Sales & CRM** for lead and opportunity handling, the sales area for quotations and sales orders, and **Accounting** for invoicing. The final outcome is a confirmed customer sale with an issued invoice ready for payment tracking.

## Trigger: [What starts this process]

This workflow starts when your team captures a new sales interest and creates or receives a **lead** in **Sales & CRM**. In day-to-day work, that usually means a salesperson opens the lead list, selects the new record, and begins reviewing the customer's details, needs, and sales potential.

A lead can also begin from a public-facing action on the website, such as a visitor requesting more information, asking for a demo, or showing interest in a service or ERP offering. Once that interest is available to your team inside **Sherkety ERP & Website Platform**, the workflow becomes an internal process: qualify the lead, turn it into a real sales opportunity, prepare a quotation, confirm the customer's acceptance, and create the invoice.

The key point is that this process does **not** start at invoicing. It starts much earlier, when someone on your team decides the contact is worth pursuing and opens the sales journey in **Sales & CRM**.

[SCREENSHOT: Lead list in Sales & CRM showing a newly captured lead ready for qualification]

## Step-by-Step Process

1. **Capture or open the lead in Sales & CRM**
   Go to the **Sales & CRM** area and open the lead from your pipeline or lead list. Review the customer name, contact details, company information, and any notes already attached. If the lead came from a website inquiry, confirm that the request is complete enough for follow-up. If important details are missing, update the lead before moving forward.

2. **Qualify the lead**
   On the lead record, assess whether the contact is a real sales prospect. Your team typically checks the customer’s need, budget, timeline, and fit for the offered service or ERP package. If the lead is not ready, keep it in the lead stage and continue follow-up. If it is promising, move it forward as an **opportunity** in the sales pipeline.

3. **Work the opportunity in the pipeline**
   Open the opportunity card and update its stage as discussions progress. Add notes from calls, meetings, or messages so everyone sees the latest status. This is the point where your sales team narrows down what the customer wants, such as accounting services, company registration support, or an ERP module package.

4. **Create the quotation**
   From the opportunity, create a **quotation**. Add the customer, choose the products or services being sold, and review prices, quantities, and any commercial terms shown on the form. Before sending anything to the customer, make sure the quotation reflects the agreed offer.

5. **Send and revise the quotation if needed**
   Share the quotation with the customer and wait for feedback. If the customer asks for changes, return to the quotation, adjust the lines or pricing, and save the updated version. The opportunity remains active until the customer accepts or declines.

6. **Confirm the quotation into a sales order**
   Once the customer agrees, confirm the quotation. This turns the commercial offer into a **sales order**, which is the official approved sale. At this handoff, your team should verify that the customer details and order lines are correct because this information carries forward into invoicing.

7. **Create the customer invoice in Accounting**
   After the sales order is confirmed, move to the invoicing step. In **Accounting**,

create or open the related **customer invoice** and check the billing details, invoice lines, and totals. If everything is correct, validate or post the invoice so it becomes an official accounting document.

8. **Track the invoice status**
   After posting the invoice, your finance team can monitor whether it is still open or has been paid. At this stage, the lead-to-invoice journey is complete: the original prospect has become a billed customer.

[SCREENSHOT: Opportunity progressing to quotation, then confirmed sales order, then customer invoice]

## Roles and Responsibilities

The workflow moves across several teams, so it helps to be clear about who owns each handoff.

| Workflow step | Main role | What this role does |
|---|---|---|
| Lead capture and first review | **Sales coordinator** or **sales representative** | Opens the lead, checks contact details, and decides whether follow-up should begin |
| Lead qualification | **Sales representative** | Reviews customer fit, updates notes, and moves the lead into an opportunity when it is worth pursuing |
| Opportunity follow-up | **Account executive** or **sales representative** | Manages pipeline stages, records conversations, and clarifies the customer’s needs |
| Quotation preparation | **Sales representative** | Creates the quotation, adds products or services, and checks pricing and terms |
| Quotation approval with customer | **Sales representative** and **customer** | Sends the quotation, answers questions, and updates it if the customer requests changes |
| Sales order confirmation | **Sales representative** or **sales manager** | Confirms the accepted quotation so the sale becomes official |
| Invoice creation | **Finance** or **accounting team** | Reviews billing details and creates or posts the customer invoice in **Accounting** |
| Invoice follow-up | **Finance** | Tracks invoice status and follows up on unpaid balances |

In smaller teams, one person may handle several of these steps. In larger teams, ownership is usually split between **Sales & CRM** and **Accounting**. If you need more detail on role-based access in the admin area, see Managing Users and Role Based Access.

## What Can Go Wrong

Most problems in this workflow happen at the handoff between one stage and the next.

- **The lead does not have enough information**
  If the lead is missing contact details or business context, the salesperson may not be able to qualify it properly. Open the lead and complete the missing fields before moving it to an opportunity.
- **The opportunity stays in the wrong stage**
  A common issue is that calls or meetings happen, but the opportunity card is never updated. This makes pipeline reporting inaccurate and can delay quotation creation. After every customer interaction, update the stage and add fresh notes.
- **The quotation does not match the customer request**
  Wrong service lines, outdated pricing, or missing items can cause delays. Before sending the quotation, review every line carefully and confirm that the offer matches the latest discussion.
- **The quotation is accepted verbally but not confirmed**
  Sometimes the customer agrees, but the sales team forgets to click the confirmation action. In that case, the sale has not officially moved forward. Open the quotation and confirm it so it becomes a **sales order**.
- **Billing details are wrong on the invoice**
  If the customer name, billing information, or invoice lines are incorrect, the finance team may need to cancel and recreate the invoice depending on your process. Always review the customer and order details before posting the invoice.
- **The invoice is created too early**
  If finance invoices before the quotation is fully accepted, the customer may dispute the bill. Make sure the quotation has been confirmed into a sales order before invoicing.

[SCREENSHOT: Quotation review screen with pricing and customer details checked before confirmation]

## Tips & Best Practices

- Keep the **lead** record clean from the start. Accurate customer names, contact details, and notes make every later step easier.
- Use the **opportunity** stage actively. Do not leave deals sitting in an old stage after calls, demos, or pricing discussions.
- Add clear internal notes after each conversation. This helps another team member continue the deal without asking the customer to repeat information.
- Before creating a **quotation**, confirm exactly what the customer wants to buy. This is especially important when offering a mix of services and ERP modules.
- Review quotation lines one by one before sending:
    - customer name
    - selected service or product
    - quantity
    - price
    - totals
- Confirm the quotation as soon as the customer accepts. Waiting too long can create confusion between “proposed” and “approved.”
- When **Accounting** prepares the invoice, compare it against the confirmed **sales order**, not against older discussion notes.
- Watch for on-screen feedback such as success messages, warnings, loading states, or error messages. If a save or confirmation action does not complete, refresh your review before assuming the record updated. For more on these messages, see Understanding Toast Messages and Action Feedback and Understanding Loading Placeholders Empty States and Errors.
- If your team works in more than one language, make sure everyone is viewing the right language context while handling public content and customer-facing details. See Switching Languages While Browsing the Platform.

## Related Workflows

This guide gives you the full path from first sales interest to invoicing. If you want to focus on one part of the journey in more detail, use these related documents:

- Opportunity to Quotation Workflow — focuses on moving a qualified deal through the pipeline and preparing the right commercial offer
- Sales Order to Invoice Workflow — covers the later handoff from confirmed order to billing in more detail

- Managing Leads Contacts and Sales Pipeline — useful when your team needs stronger lead qualification and pipeline discipline
- Understanding Quotations Automation and Follow Up — helpful for quotation revisions, customer responses, and follow-up timing
- Reviewing Sales Reporting and Pricing — useful when you want to compare deal progress with pricing decisions
- Understanding Accounting Workflows and Compliance Value — helpful for the invoicing side of the process

If your main pain point is getting from a qualified deal to a customer-ready offer, the next document to read is Opportunity to Quotation Workflow.

## FAQ

**When should I turn a lead into an opportunity?**
Move a lead forward when you have enough information to treat it as a real sales deal. That usually means you understand the customer's need, there is genuine interest, and your team is ready to prepare or discuss an offer.

**Can I create a quotation before the lead is fully qualified?**
You can, but it often creates rework. In **Sherkety ERP & Website Platform**, it is better to qualify the lead first so the quotation reflects a real need and accurate pricing.

**What is the difference between a quotation and a sales order?**
A **quotation** is the proposed offer sent to the customer. A **sales order** is the confirmed version after the customer accepts.

**Who should create the invoice?**
This is usually handled by the **finance** or **accounting team** in **Accounting**, after the quotation has been confirmed into a sales order.

**Can the invoice be changed after it is created?**
That depends on your team's accounting process. In practice, you should review customer details, invoice lines, and totals carefully before posting the invoice to avoid corrections later.

**What if the customer asks for changes after receiving the quotation?**
Open the quotation, update the requested items or pricing, save the changes, and resend the revised quotation. Do not confirm it until the customer agrees to the final version.

### What if the opportunity is lost?

If the customer decides not to move forward, keep the record updated in the pipeline so your reporting stays accurate. Add notes explaining why the deal did not proceed.

### Which guide should I read next?

Continue with Opportunity to Quotation Workflow for a closer look at the qualification, pipeline, and quotation stages.