Managing Leads Contacts and Sales Pipeline

August 25, 2026

Understanding How Leads, Contacts, and Opportunities Connect

In Sherkety ERP & Website Platform, the **Sales & CRM** area brings three related workflows together: collecting new prospects, keeping customer details organized, and tracking active deals in the sales funnel. If you already reviewed the broader module tour in Exploring Sales and CRM Overview, this section focuses on how those records connect during day-to-day selling.

A **lead** is the starting point. Use it for someone who has shown interest but is not yet ready to be treated as an active deal. This might be an inquiry from a form, a referral, or an early conversation where you still need to confirm who the buyer is, what company they represent, or whether there is a real sales opportunity.

Once details are clearer, that lead can be tied to a **contact** or **company** record. The contact record is where you keep the person's communication details and relationship history. This is the place for items such as the person's name, company, email address, phone number, and notes from conversations. If the same customer returns later, your team can continue from the same record instead of starting over.

An **opportunity** is different from a contact. It represents a real deal moving through the pipeline. In the pipeline view, opportunities appear as cards arranged by stage so your team can see what is in early discussion, what is being prepared for proposal, and what is close to closing.

Think of it this way:

- **Lead** = an unqualified prospect
- **Contact** = the person or company you know and communicate with
- **Opportunity** = the revenue-focused deal you are trying to win

[SCREENSHOT: Sales & CRM area showing separate lead details, contact information, and pipeline cards]

Capturing New Leads and Building Contact Records

When a new prospect reaches out, start in the **Sales & CRM** area and open the lead entry form. This is where your team records early information before deciding whether the inquiry belongs in the active pipeline. Enter as much verified information as you have so the record is useful from the start.

Typical details to capture include:

Field	What to enter
Name	The prospect's name
Company	The business they represent
Email	Their main email address
Phone	Their direct or company phone number
Source	Where the inquiry came from

At this stage, the goal is not to force every inquiry into a deal. Sherkety ERP & Website Platform lets you keep early-stage prospects as leads while your team confirms whether there is a real sales fit. That helps you avoid cluttering the pipeline with names that are still too early to forecast.

As conversations progress, enrich the record with better details. If you confirm the buyer's identity, company, and communication channels, build or update the related contact record so future activity stays connected to the same person or account. This is especially useful when a prospect first arrives with limited information and later becomes a known customer contact.

Use contact records to keep relationship details in one place, including:

- Primary communication details
- Company association
- Notes from calls or follow-ups
- Ongoing account history tied to that person or business

[SCREENSHOT: New lead form with name, company, email, phone, and source fields]

A clean contact record saves time later. Instead of re-entering the same buyer details for every conversation, your team can reuse the existing contact and focus on moving the sale forward.

Qualifying Prospects Before Adding Them to the Pipeline

Not every lead should appear in the pipeline right away. Before your team creates an active opportunity, review the lead and confirm that it is ready for sales follow-up as a real deal. This qualification step keeps the funnel realistic and helps managers trust what they see on the pipeline board.

Look at the lead record and check whether the basic facts are complete. At minimum, confirm that the prospect can be identified and contacted. If the record is missing a reliable name, company, email address, or phone number, keep it in the lead stage until those details are clearer. A lead with incomplete information may still be worth keeping, but it is not yet strong enough to treat as a forecastable opportunity.

Then review sales relevance. Ask whether the prospect has shown real interest, whether the company fits your target customer profile, and whether there is a meaningful reason to continue the conversation. If the inquiry is only informational or too early to pursue, keep it as a lead or maintain only a contact record for future follow-up.

Use these decision points:

- Keep it as a **lead** when details are still incomplete or interest is not yet confirmed
- promote it to an **opportunity** when the prospect is qualified and an active sales discussion is underway
- keep only a **contact** when you want the person or company in your records but there is no current deal to track

This distinction matters. When unready prospects are pushed into the pipeline too early, the board becomes crowded and expected revenue becomes less reliable. By qualifying first, Sherkety ERP & Website Platform helps your team focus on deals that are actually moving.

[SCREENSHOT: Lead review screen with contact details and qualification notes before pipeline entry]

Moving Opportunities Through the Sales Pipeline

Once a prospect is qualified, open the pipeline board in **Sales & CRM** to manage the deal as an opportunity. The pipeline is organized as stage-based columns, with each opportunity shown as a card. This layout makes it easy to see where every deal stands and which items need attention.

1. Open the **Sales & CRM** pipeline view.

2. Create a new opportunity from a qualified lead, or add one directly if a sales conversation is already underway.
3. Enter the deal details on the opportunity card or form.
4. Place the opportunity in the correct stage.
5. Update the stage each time the customer interaction moves forward.

Common funnel stages include:

- **Initial Contact**
- **Qualification**
- **Proposal**
- **Negotiation**
- **Closing**

Each opportunity should hold the details that matter for the deal itself, not just the person's contact information. Use the opportunity to track items such as:

Opportunity detail	Why it matters
Expected Value	Shows the potential revenue of the deal
Assigned Salesperson	Clarifies ownership
Target Close Timing	Helps with planning and forecasting
Current Stage	Shows where the deal is in the funnel

[SCREENSHOT: Pipeline board with opportunity cards across sales stages]

Keep the card updated after every meaningful conversation. If a proposal has been sent, move the opportunity to **Proposal**. If pricing is being discussed, move it to **Negotiation**. If the customer is ready to commit, place it in **Closing**. Accurate stage updates help the whole team understand the true status of the pipeline and prepare for the next action.

Using Contact History to Support Sales Follow-Up

A strong pipeline depends on more than stage changes. Your team also needs the full relationship picture, and that starts with the contact record. In Sherkety ERP & Website Platform, use the contact record as the main reference point for the buyer or company behind the deal.

Store ongoing communication details on the contact so anyone reviewing the account can quickly understand prior interactions. This includes emails, calls, notes, and other relationship context that explains what the customer asked for, what concerns they raised, and who has already spoken with them. Before advancing an opportunity, sales reps can review this history and avoid repeating questions the customer has already answered.

This shared history becomes even more valuable when the same customer has more than one sales conversation over time. Instead of creating separate copies of the same person or company, attach activity to the existing contact whenever possible. That keeps the record clean and makes it easier to understand the full account relationship.

Complete contact records help with:

- seeing previous conversations before the next follow-up
- reducing duplicate entry across multiple deals
- keeping buyer and company details consistent
- supporting handoffs between team members
- personalizing outreach based on known history

[SCREENSHOT: Contact record showing communication notes and linked sales activity]

When an open opportunity is linked to the right contact, the sales rep can view both the deal status and the relationship background together. That combination is what makes follow-up more effective. Instead of treating every call like a fresh start, your team can continue the conversation with context, which improves continuity and creates a smoother customer experience across the funnel.

Common Issues and How to Fix Them

Most Sales & CRM problems come from records being saved in the wrong place or not being linked together. When something looks missing or incorrect, start by checking whether the prospect is stored as a lead, a contact, or an opportunity.

If a **lead was created but does not appear in the pipeline**, the most likely reason is that it is still a lead-only record. The pipeline shows active opportunities, not every inquiry. Open the record and confirm that it has been qualified and converted into an opportunity before expecting to see it on the board.

If **duplicate people or companies appear**, review how the record was created. This often happens when someone enters a new lead instead of attaching the latest activity to an existing contact. Search for the person or company first before creating another record. If the customer already exists, continue using that contact so communication history stays in one place.

If an **opportunity is in the wrong stage**, open the pipeline card and verify the selected stage. Deals often become outdated when a rep has a customer conversation but forgets to move the card afterward. Update the stage as soon as the deal changes from initial discussion to proposal, negotiation, or closing.

If **sales reps cannot see full customer context**, check whether the notes, contact details, and open opportunity are attached to the same contact or company profile. When information is split across separate records, the account view feels incomplete.

Use this quick troubleshooting guide:

- **Missing from pipeline**: confirm the record is an opportunity, not only a lead
- **Duplicate records**: search existing contacts before adding a new one
- **Wrong stage**: update the opportunity card after each major interaction
- **Missing history**: make sure notes and deal records are linked to the same contact or company

[SCREENSHOT: CRM records showing lead status, linked contact, and opportunity stage]

Overview

This document focuses on the practical flow of managing prospects inside the **Sales & CRM** area of Sherkety ERP & Website Platform. The main idea is simple: start with a lead when an inquiry is still early, build or update a contact record once the person or company is known, and create an opportunity only when there is a real deal to track in the pipeline.

Use this workflow to keep records clear:

- capture new inquiries as **leads**
- confirm buyer and company details in the **contact** record
- track active revenue discussions as **opportunities**
- move opportunity cards through the pipeline as the sale progresses

This separation helps your team avoid two common problems: treating every inquiry like a live deal, and storing customer details in too many places. Contact records hold the relationship history, while opportunity cards hold deal-specific information such as value, owner, close timing, and stage.

If you need a broader introduction to where Sales & CRM fits within Sherkety ERP & Website Platform, return to Exploring Sales and CRM Overview. That guide explains the module at a higher level, while this one focuses on the daily work of capturing prospects and managing the funnel.

[SCREENSHOT: Sales & CRM workflow from lead to contact to opportunity]

The next step is learning how activity continues after an opportunity enters the pipeline, especially around proposals, reminders, and ongoing follow-up. Continue with Understanding Quotations Automation and Follow Up.

Prerequisites

Before working with leads, contacts, and opportunities in Sherkety ERP & Website Platform, make sure you can access the **Sales & CRM** area and understand the basic navigation used across the workspace. You do not need advanced setup knowledge, but a few basics will make the workflow easier.

You should already be comfortable with:

- opening the **Sales & CRM** section from the main navigation
- recognizing list views, forms, and pipeline-style boards
- selecting or searching for an existing person or company before creating a new record
- reading status or stage labels on cards and records

It also helps if you have already reviewed:

- Exploring Sales and CRM Overview
- Understanding Breadcrumbs Drawers and Shared Navigation Patterns
- Understanding Toast Messages and Action Feedback

For day-to-day use, gather the prospect details you are likely to enter:

- person's name
- company name
- email address
- phone number
- lead source
- any notes from the first conversation

If your team shares accounts, agree on a simple habit before you begin: always search for an existing contact or company first. That one step reduces duplicate records and keeps communication history together.

[SCREENSHOT: Sales & CRM navigation entry and search area for finding existing contacts]

When these basics are in place, you can move through lead capture, qualification, contact management, and pipeline updates without breaking the customer record into separate pieces.