Opportunity to Quotation Workflow

August 25, 2026

Overview

In **Sherkety ERP & Website Platform**, this workflow starts when a sales opportunity is ready to move from discussion and qualification into a formal offer. The process connects the **Sales & CRM** area with the quotation stage, where customer details, ownership, and offer information need to be checked before anything is sent.

The final outcome is a prepared quotation linked to the right customer and handled by the right salesperson. If you need the earlier lead qualification context, see Lead to Invoice: The Full Customer Journey.

Trigger: [What starts this process]

This workflow begins when an opportunity in the **Sales & CRM** pipeline has moved beyond early discovery and is ready for a priced offer. In practical terms, that usually means the salesperson has enough information to prepare a quotation: the customer is identified, the need is clear, and the deal is worth pursuing.

On the opportunity screen in **Sherkety ERP & Website Platform**, the trigger is usually a user decision rather than an automatic background event. A salesperson or sales coordinator opens the opportunity card or detail view, reviews the customer information, confirms the assigned owner, and then starts the quotation handoff from there. Before doing that, make sure the opportunity record includes the correct contact or company details and that there is no confusion about who owns the deal.

This is the point where the workflow changes from relationship tracking to commercial preparation. The opportunity is still the source of truth for the sales conversation, but the quotation becomes the document the customer will review. If the opportunity is still missing key details, stop here and complete them first instead of creating a quotation too early.

[SCREENSHOT: Opportunity detail screen showing customer details, salesperson assignment, and the action used to start a quotation]

Step-by-Step Process

Follow this flow when moving a qualified opportunity into a quotation in **Sherkety ERP & Website Platform**:

1. **Open the opportunity in Sales & CRM**
   Go to the **Sales & CRM** area and open the qualified opportunity from your pipeline or list view. Review the visible deal information before taking any action. Focus on the customer name, contact details, expected need, and the assigned salesperson.
2. **Check customer information**
   On the opportunity screen, confirm that the customer record is the right one. If the opportunity is linked to the wrong person or company, correct that before creating the quotation. This avoids sending an offer under the wrong customer name or splitting activity history across duplicate records.
3. **Confirm ownership and handoff readiness**
   Verify that the opportunity is assigned to the correct salesperson. Ownership matters because the quotation should stay connected to the person responsible for follow-up. If your team uses shared qualification and closing responsibilities, agree on the owner before continuing.
4. **Start the quotation from the opportunity**
   Use the quotation action available from the opportunity screen to create the sales offer. This keeps the quotation tied to the opportunity instead of starting from a separate screen with no sales context.
5. **Review the quotation details**
   When the quotation opens, check that the customer information carried over correctly. Then complete the commercial details needed for the offer, such as the items or services being quoted and any pricing information your team normally includes.
6. **Validate before saving or sending**
   Read through the quotation carefully. Make sure the customer, salesperson, and offer details all match the opportunity. Save the quotation once it is complete. If your process includes customer review immediately, prepare it for sending only after the final check.
7. **Return to the opportunity if needed**
   If you notice missing context, go back to the opportunity and update the sales

notes or customer details there. The opportunity should still reflect the current state of the deal even after the quotation has been created.

[SCREENSHOT: Quotation screen opened from an opportunity, showing customer details and salesperson ownership]

Roles and Responsibilities

The handoff from opportunity to quotation is usually shared between sales-focused roles. Use this breakdown to keep ownership clear in **Sherkety ERP & Website Platform**:

Step	Who usually handles it	What they do
Review the opportunity	**Salesperson**	Opens the opportunity in **Sales & CRM**, checks deal readiness, and confirms it is ready for a formal offer.
Validate customer details	**Salesperson** or **Sales Coordinator**	Confirms the correct customer or company is linked before the quotation is created.
Confirm deal ownership	**Sales Manager** or **Salesperson**	Makes sure the right person is assigned to the opportunity so follow-up and reporting stay accurate.
Create the quotation	**Salesperson**	Starts the quotation directly from the opportunity to preserve the sales context.
Complete pricing and offer details	**Salesperson**	Adds the offer details required for the customer-facing quotation.
Review for accuracy	**Salesperson** or **Sales Coordinator**	Checks customer name, quotation content, and ownership before saving or sending.
Resolve exceptions	**Sales Manager**	Steps in if there is confusion about ownership, duplicate customers, or whether the opportunity is truly qualified.

A few practical points help avoid confusion:

- **Salesperson**: Owns the day-to-day movement from opportunity to quotation.
- **Sales Coordinator**: Helps clean up customer information and review the quotation before it goes out.
- **Sales Manager**: Resolves disputes, reassigns ownership when needed, and keeps the pipeline consistent.

If your team already documented lead qualification in Lead to Invoice: The Full Customer Journey, keep using that same ownership logic here so the handoff stays consistent.

What Can Go Wrong

Most problems in this workflow happen at the handoff between the opportunity record and the quotation. Watch for these common issues in **Sherkety ERP & Website Platform**:

- **The opportunity is not actually ready**
  - The salesperson starts a quotation before the customer need is clear.
  - Fix it by returning to the opportunity and completing the missing discussion points before preparing the offer.
- **Wrong customer linked**
  - The quotation is created from an opportunity tied to the wrong contact or company.
  - Fix it on the opportunity first, then review the quotation to make sure the correct customer appears.
- **Duplicate customer records**
  - A salesperson cannot tell which customer entry is the right one and selects the wrong record.
  - Fix it by checking previous activity, company naming, and existing deal history before continuing.
- **Ownership is unclear**
  - The opportunity belongs to one person, but another person prepares the quotation without reassignment.
  - Fix it by confirming the assigned salesperson before creating the quotation so follow-up and reporting stay accurate.
- **Quotation details do not match the opportunity**
  - The offer includes the wrong service, outdated pricing, or incomplete scope.
  - Fix it by comparing the quotation against the opportunity notes before saving.
- **Missing follow-up context**

    - The quotation exists, but the opportunity does not show the latest status or discussion summary.
    - Fix it by updating the opportunity after quotation creation so both records stay aligned.

- **User access blocks the handoff**
    - A user can sign in but cannot reach the needed admin or protected areas.
    - Fix it by asking an authorized user to review role access through the user management screens described in Managing Users and Role Based Access.

[SCREENSHOT: Example of an opportunity review before quotation creation, highlighting customer and owner fields]

Tips & Best Practices

Use these habits to keep the opportunity-to-quotation handoff clean and reliable in **Sherkety ERP & Website Platform**:

- Create the quotation **from the opportunity screen**, not from memory. This helps preserve the customer link and salesperson ownership.
- Review the **customer name** and **contact details** before you start. A one-minute check here prevents rework later.
- Keep the **assigned salesperson** accurate. If ownership changes, update it before the quotation is created.
- Use the opportunity as your working record for sales context. Keep notes, qualification details, and conversation history there even after the quotation exists.
- Before saving, compare the quotation against the opportunity and ask:
    - Is this the right customer?
    - Is the right salesperson attached?
    - Does the offer match what was discussed?
- If your team works in more than one language, make sure customer-facing wording is reviewed carefully, especially when switching between localized pages and content areas elsewhere in **Sherkety ERP & Website Platform**. For broader language behavior, see Switching Languages While Browsing the Platform.
- Use on-screen confirmations and notices to catch issues early. If you see a warning, loading message, or error state while moving between records, pause and confirm that the quotation saved correctly. For more on these interface

signals, see Understanding Loading Placeholders Empty States and Errors and Understanding Toast Messages and Action Feedback.

[SCREENSHOT: Final quotation review screen before saving or sending]

Related Workflows

This workflow sits in the middle of the sales journey in **Sherkety ERP & Website Platform**.

- For the earlier qualification stages that happen before a quotation is created, read Lead to Invoice: The Full Customer Journey.
- For broader sales context around pipeline handling, customer tracking, and quotation preparation, see Managing Leads Contacts and Sales Pipeline and Understanding Quotations Automation and Follow Up.
- If you want the next stage after a quotation is prepared, continue with Sales Order to Invoice Workflow.

These links are useful when you need to understand not just the handoff itself, but also what comes before and after it in the full commercial process.

FAQ

When should I create a quotation from an opportunity?
Create it when the opportunity is qualified enough for a formal offer. You should already know who the customer is, what they need, and who owns the deal.

Should I fix customer details before or after creating the quotation?
Fix them before creating the quotation whenever possible. That reduces the chance of carrying incorrect customer information into the offer.

Why does salesperson ownership matter here?
Ownership affects follow-up, accountability, and reporting. If the wrong person is attached to the opportunity or quotation, the deal can be missed or tracked incorrectly.

Can I update the opportunity after the quotation is created?
Yes. You should keep the opportunity current with the latest status, notes, and context so the sales record stays complete.

What if I notice the quotation does not match the opportunity?
Open both records and compare them. Correct the customer, ownership, or offer details before sending anything to the customer.

What should I read next?

Continue with Sales Order to Invoice Workflow to follow what happens after the quotation stage.