SHERKETY BYTES ALIGN

Reviewing Sales Reporting and Pricing

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Reading the Sales and CRM performance snapshot

On the **Sales & CRM** page in Sherkety ERP & Website Platform, the performance snapshot is presented as a quick-read section that helps you judge whether the module gives enough visibility for day-to-day sales management. Look first for the top summary cards or highlighted metric blocks. These typically focus on the most decision-ready numbers: **sales totals**, **pipeline value**, **won opportunities**, and **activity indicators** that show how actively the team is moving deals forward.

These summary areas are useful because they combine two views of performance in one place. Sales totals and won opportunities help you understand closed business, while pipeline value and activity indicators point to future demand and current sales momentum. That mix matters if you are evaluating whether the Sales & CRM module supports both reporting and forecasting.

Below or near the summary cards, you may see visual reporting blocks such as a revenue trend chart, conversion-focused graphics, or team performance summaries. Use these visuals to read direction, not just totals. A rising revenue line suggests growth over time, while lead or opportunity conversion visuals help you judge how well the sales process turns interest into business. Team comparison blocks can also show whether performance is evenly distributed or dependent on a few strong contributors.

If the page includes a date selector or period filter, switch between the **current period**, **previous period**, or a **custom range** to compare performance views. This is especially helpful when numbers seem strong in one snapshot but need more context across time.

[SCREENSHOT: Sales & CRM page showing KPI cards, chart widgets, and date-range controls]

If you already reviewed quotation workflows in Understanding Quotations Automation and Follow Up, use this page as the next layer: it shows how those activities are measured after they happen.

Comparing reporting and analytics views

The reporting area on the **Sales & CRM** page helps you move from headline numbers into a more detailed view of sales performance. Start with the visual widgets. These may include **revenue charts**, **opportunity stage breakdowns**, and **salesperson comparison** panels. Each one answers a different question. Revenue charts show whether sales are growing or slowing. Stage breakdowns show where deals are collecting in the pipeline. Salesperson comparisons help you see whether results are balanced across the team.

When reading these sections, move in this order:

1. Review the top summary cards to understand the overall picture.
2. Open or inspect the visual charts to see patterns and trends.
3. Use any linked lists, detail views, or drill-down sections to inspect the records behind the totals.

This flow is important because a single total can hide useful detail. For example, a strong pipeline value may look positive until the stage breakdown shows that most opportunities are still early and not close to closing. In the same way, high revenue may be concentrated in one salesperson or one customer segment.

If filters are available in the analytics area, use them to narrow the view by:

- **Sales team**
- **Salesperson**
- **Customer**
- **Product**
- **Pipeline stage**

These filters help you evaluate whether the reporting supports real management decisions rather than only broad summaries. Trend lines and period comparisons are especially valuable here. A comparison between current and previous periods can reveal whether growth is consistent, seasonal, or driven by a short-term spike. For buyers, that matters because forecasting tools are only useful when they help explain movement over time.

[SCREENSHOT: Reporting section with revenue chart, stage breakdown, and comparison filters]

If you want broader context on how the module is positioned before diving into analytics, return to Exploring Sales and CRM Overview.

Reviewing pricing and plan information

The **Sales & CRM** page in Sherkety ERP & Website Platform also supports buying decisions by placing pricing information near the feature and reporting content. Look for pricing blocks, plan cards, comparison tables, or highlighted callout panels. These sections help you compare what is included at different levels, especially if you are weighing sales automation, customer tracking, and reporting depth together.

Begin by scanning the visible plan structure. If the page presents multiple tiers, compare them side by side instead of reading one card at a time. This makes it easier to spot differences in included capabilities, especially around CRM tracking, quotation support, pipeline visibility, and reporting access. A comparison table is particularly useful when you need to see which plan covers the reporting and management features your team depends on.

If the page includes a pricing selector, billing switch, or package comparison control, change the visible option before making assumptions. For example, a billing period toggle may change how prices are shown, and a package selector may highlight different combinations of sales and related ERP capabilities. Read the surrounding labels carefully so you know whether the displayed amount reflects a monthly view, a broader package, or a feature bundle.

Pricing on this page is not only about cost. The layout usually supports value-based evaluation. Instead of asking only “Which plan is cheaper?”, use the pricing section to ask:

- Does this option include enough reporting visibility for managers?
- Does it support pipeline tracking for the sales process we use?
- Does the plan match our need for automation and follow-up visibility?

[SCREENSHOT: Pricing cards or comparison table on the Sales & CRM page]

That approach helps you judge total fit, especially if your team needs both front-line CRM activity tracking and management-level reporting in the same module.

Using buyer decision content to evaluate fit

Beyond charts and prices, the **Sales & CRM** page includes decision-support content meant to help you judge business fit. This content usually appears as benefit statements, short use-case highlights, value callouts, or comparison-style messaging placed near feature summaries and pricing sections. Read these areas closely because they explain why the module matters, not just what it contains.

Look for statements tied to practical outcomes such as improving pipeline visibility, speeding up follow-up, increasing conversion control, or giving managers clearer sales reporting. These messages help connect the module to everyday revenue work. If your team needs better forecasting, cleaner handoff between leads and quotations, or stronger visibility into sales activity, these callouts help you decide whether the page is speaking to your situation.

Proof points may appear as trust-focused statements, adoption-oriented messaging, process improvement claims, or efficiency highlights. These are useful when they connect directly to measurable business concerns such as:

- Better visibility into future demand
- Stronger control over opportunity stages
- Faster reporting for sales leadership
- Clearer understanding of team performance

You may also see feature comparisons or business outcome panels that position Sales & CRM alongside broader ERP needs. Use these sections to judge implementation readiness. If the page connects reporting, pipeline control, and pricing clearly, it is helping you answer common buying questions: Will this improve decision-making? Will managers get useful visibility? Will the sales team actually use it?

[SCREENSHOT: Buyer-focused value statements and proof-point callouts on the Sales & CRM page]

If the decision content feels familiar, that is because it builds on the earlier workflow topics in Managing Leads Contacts and Sales Pipeline and Understanding Quotations Automation and Follow Up, but here the focus is evaluation rather than daily use.

Following the next-step actions on the page

Once you have reviewed reporting, analytics, and pricing, the next step on the **Sales & CRM** page is usually one of the visible call-to-action buttons. In Sherkety ERP & Website Platform, these actions are designed to move you from browsing into direct evaluation. Look for buttons such as **Request Demo**, **Start Trial**, **Contact Sales**, or **View Pricing**. The exact wording may vary by section, but the purpose is clear: each button supports a different buying stage.

Use **Request Demo** when you want a guided walkthrough. This action usually leads to a contact or inquiry flow where you can ask for a product demonstration focused on your sales process, reporting needs, or pipeline management questions.

Choose **Start Trial** if you are ready for hands-on exploration. This is the better option when you want to test the experience directly rather than begin with a conversation.

Select **Contact Sales** when your questions are commercial or scope-related. This is useful if you need clarification on package fit, pricing structure, or how Sales & CRM connects with other ERP areas.

Open **View Pricing** when you want to stay in research mode and compare plan details more closely before taking a direct action.

Secondary actions may also appear nearby, such as links to related ERP modules, deeper comparison content, or supporting product pages. These are helpful if you are still deciding whether Sales & CRM alone is enough or whether you should evaluate connected areas like reporting or broader ERP packages.

[SCREENSHOT: Sales & CRM page showing primary and secondary call-to-action buttons]

A practical path for most buyers is:

1. Review the reporting snapshot.
2. Compare pricing and value statements.
3. Use **Request Demo** for guided validation or **Start Trial** for self-directed evaluation.

Resolving common questions when interpreting the page

If the numbers on the **Sales & CRM** page seem inconsistent, start by checking the visible date range and any active filters. A total shown for the current period may not match a chart that is still displaying a previous period or a custom range. The same issue can happen when one visual is filtered to a sales team or pipeline stage while another remains unfiltered. Before comparing values, make sure the same period and segment are applied across the page.

If the pricing section feels unclear, slow down and read the labels around each pricing card or comparison block. Pay attention to whether the page is showing a plan tier, a package comparison, or a billing-period view. If included capabilities are not obvious, rely on the comparison layout rather than the headline price alone. Feature coverage for reporting, CRM tracking, and sales automation is often more important than the first number you see.

Sometimes the buyer decision content is helpful but still too high level. When that happens, use the page as a starting point rather than your final proof. The best next move is to choose an action that gives you more concrete validation:

- Use **Request Demo** if you want to see reporting and pipeline workflows in context
- Use **Contact Sales** if you need commercial clarification
- Use **View Pricing** or related comparison content if you are still narrowing options
- Use **Start Trial** if you prefer direct exploration

If you are unsure which action fits best, match the button to your current question. Questions about usability or reporting depth usually point to a demo. Questions about cost or package fit usually point to sales contact. Questions about general product fit often start with more page exploration.

This page is most useful when you treat it as a decision screen: confirm the numbers, read the value positioning, then choose the action that closes your biggest remaining gap.

Overview

The **Sales & CRM** page in Sherkety ERP & Website Platform brings together four things buyers usually need in one view: performance signals, reporting visuals, pricing information, and next-step actions. Instead of presenting Sales & CRM as a simple feature list, the page helps you evaluate how the module supports revenue work from both an operational and management perspective.

The reporting side of the page focuses on visible sales outcomes and pipeline health. Summary cards, charts, and comparison visuals help you understand closed revenue, future opportunities, and team activity. This makes the page useful not only for learning what the module does, but also for judging whether it offers enough visibility for forecasting, performance tracking, and sales oversight.

The pricing side supports comparison. Plan cards, pricing blocks, and package-oriented content help you see how Sales & CRM is positioned commercially. When read together with the reporting content, pricing becomes easier to interpret because you can connect cost with business value instead of reading prices in isolation.

The page also includes buyer decision content such as benefit statements, business outcome messaging, and proof-oriented callouts. These sections help answer practical questions like:

- Will this improve pipeline control?
- Will managers get clearer reporting?
- Does the pricing match the level of visibility and automation we need?

Finally, the page includes direct actions such as **Request Demo**, **Start Trial**, **Contact Sales**, or **View Pricing**, so you can move from evaluation into a concrete next step without leaving the buying journey.

[SCREENSHOT: Full Sales & CRM page showing reporting, pricing, value messaging, and action buttons]

Prerequisites

Before using this page effectively, it helps to have a basic understanding of the earlier Sales & CRM content in Sherkety ERP & Website Platform. You do not need technical knowledge, but you will get more value from the reporting and pricing sections if you already know the core sales workflow and the terms used on the page.

Review these documents first if needed:

- Exploring Sales and CRM Overview
- Managing Leads Contacts and Sales Pipeline
- Understanding Quotations Automation and Follow Up

It also helps if you are ready to evaluate the page from a buyer's point of view. That means having a rough idea of:

- Whether your team needs stronger pipeline visibility
- Whether sales managers need clearer reporting or forecasting
- Whether you are comparing plans, packages, or broader ERP options
- Whether you prefer a self-serve review or a guided demo

As you read the page, pay attention to these visible interface elements:

- KPI cards and summary blocks
- Revenue and pipeline charts
- Filters and date-range controls
- Pricing cards or comparison tables
- Call-to-action buttons such as **Request Demo** or **Start Trial**

If you are browsing the public site in more than one language, the page may also appear in a localized version. In that case, use the same reading approach and compare the same sections rather than switching between different parts of the page.

For the next step in this learning path, continue to Understanding Sales and CRM Module Value for Revenue Teams.