SHERKETY BYTES ALIGN

Understanding Quotations Automation and Follow Up

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Exploring How Quotations Move from Lead to Signed Deal

In **Sherkety ERP & Website Platform**, quotations are closely tied to the sales opportunity you already manage in the pipeline. If you have already worked through lead qualification, contact updates, and stage movement in Managing Leads Contacts and Sales Pipeline, the next step is turning that active opportunity into a formal offer the customer can review and approve.

From the **Sales & CRM** area, a salesperson typically opens an opportunity and creates a quotation using the same customer details already stored on that record. This keeps the **customer name**, **contact information**, expected deal value, notes, and previous sales conversations connected instead of scattered across separate screens. When you return to the opportunity later, you can still see the quotation alongside calls, emails, meetings, and internal notes.

The quotation itself usually moves through a clear lifecycle:

- **Draft quotation** while you prepare products, prices, and terms
- **Sent quotation** once it has been shared with the customer
- **Customer review and approval** when the buyer checks the offer online
- **Confirmed sale** after acceptance, when the quotation becomes a sales order

This connected flow helps both the sales team and the buyer. Salespeople do not need to re-enter the same information each time they prepare an offer, and managers can quickly see which opportunities are waiting on a quote, which quotes have been sent, and which deals are ready to close.

For the customer, automation shortens the wait between first discussion and receiving a professional quotation. For the sales team, it reduces manual chasing and gives clearer visibility into deal progress through the pipeline.

[SCREENSHOT: Opportunity record showing linked quotation, customer details, and activity history]

Building Quotations with Products, Pricing, and Optional Items

When you create a quotation in **Sherkety ERP & Website Platform**, most of the work happens directly on the quotation form. After choosing the **Customer**, you add the items the prospect is considering in the quotation lines. Each line usually includes the **Product**, **Quantity**, **Unit Price**, and any applicable **Taxes**. You can also set a **Validity Date** so the customer knows how long the offer remains available.

This screen is where accuracy matters most. Instead of typing every detail from scratch, the quotation can pull from your existing product catalog and pricing setup. That means sales teams can search for products already available in the list, add them quickly, and rely on saved pricing rules rather than manually entering every amount. If different customers receive different rates, customer-specific pricing can help keep the quotation aligned with the agreed commercial terms.

A well-prepared quotation often includes more than the main offer. Many teams use **Optional Products** to suggest add-ons or upgrades the customer can choose before accepting. This is especially useful when you want to present a base offer together with premium options, support add-ons, or extra services without cluttering the main quotation lines.

To speed up preparation even further, sales teams can use **Quotation Templates**. These templates help standardize:

- Common product bundles
- Repeated sales text and terms
- Frequently used pricing structures
- Optional upsell items

Using templates keeps quotations consistent across the team and reduces errors caused by copying old documents manually. It also makes it easier to prepare a polished offer quickly while still tailoring quantities or selected items for each customer.

[SCREENSHOT: Quotation form with customer, quotation lines, optional products, and validity date fields]

Automating Sending, Approval, and Customer Acceptance

Once the quotation is ready, **Sherkety ERP & Website Platform** lets you send it directly from the quotation record. This is important because the sending action stays attached to the same sales document instead of being handled in a separate email thread that others cannot see. The salesperson can use a prepared email layout so the wording stays professional and consistent across the team.

Sending from the quotation screen helps standardize communication in a few practical ways:

- The quotation details stay linked to the customer and opportunity
- The outgoing message can follow a reusable email format
- The team can quickly see whether the quotation has already been sent
- Follow-up work starts from the same record instead of separate notes

For the customer, the approval process is much simpler than exchanging edited files back and forth. Instead of printing or requesting another copy by email, the buyer can review the quotation online, check the products, pricing, and terms, and then confirm acceptance through the quotation flow. This reduces delays caused by version confusion or missing attachments.

Where online signing is enabled, **eSignature** support can shorten approval even more. The customer can sign the quotation digitally, which removes the need to print, sign by hand, scan, and resend the document. That is especially helpful when multiple quotations are moving at once and the sales team needs a clear, trackable approval path.

After the customer accepts the quotation, the process continues smoothly into the next sales step. An approved quotation can move forward as a confirmed sales order, so the team does not need to rebuild the deal from scratch after approval. This keeps the sales cycle moving and gives everyone a single source of truth from first quote to final confirmation.

[SCREENSHOT: Sent quotation with customer acceptance and online signature area]

Keeping Prospects Engaged with Scheduled Follow-Up Activities

Sending a quotation is only part of the job. In **Sherkety ERP & Website Platform**, the real difference often comes from what happens next. After a quotation has been sent, the salesperson can schedule follow-up activities on the same opportunity so the prospect does not go quiet without a reminder in place.

These activities usually cover common next steps such as:

- **Call** the prospect to confirm they received the quotation
- **Email** a clarification or reminder
- **Meeting** to review pricing or scope
- Any planned next action tied to the deal

This matters because a quotation without a scheduled next step is easy to forget, especially when a salesperson is managing many active opportunities. By setting a follow-up activity immediately after sending the quotation, the team gets a visible reminder of when to re-contact the customer. That helps prevent delays where a promising quote sits untouched simply because no one was prompted to act.

The shared history on the opportunity also keeps context in one place. Notes, messages, and completed activities remain attached to the same customer and deal, which makes handoffs easier and avoids repeated questions to the prospect. If a manager opens the opportunity, they can quickly review what was sent, what the customer asked, and what follow-up is due next.

Pipeline visibility also improves. Sales teams and managers can use **stage status** and **next activity** indicators to spot quotations that are waiting too long for a response. Instead of scanning emails manually, they can identify opportunities that need attention before momentum is lost.

[SCREENSHOT: Opportunity view showing next activity, scheduled call, and quotation status]

Measuring Quotation Performance and Sales Team Responsiveness

Quotation work becomes much easier to improve when teams can see what is happening across the full sales cycle. In **Sherkety ERP & Website Platform**, connected **Sales** and **CRM** data makes it possible to compare how many quotations were prepared, how many were sent, how many were accepted, and which opportunities were eventually lost.

This kind of reporting helps teams answer practical questions such as:

- Are quotations being sent quickly after the first serious customer conversation?
- Which opportunities stall after the quotation goes out?
- Which salespeople have overdue follow-up actions?
- Are accepted quotations concentrated in certain stages, products, or customer types?

Because quotation activity stays tied to the opportunity, reporting can show where delays happen between first contact and closing. For example, a manager may notice that opportunities move quickly through early pipeline stages but remain too long in the stage where the customer is reviewing a quotation. That points to a follow-up issue, a pricing issue, or a need for clearer quotation content.

Activity visibility is just as important as conversion visibility. Upcoming actions, overdue reminders, and salesperson workload can all help teams decide where to focus attention first. A quotation that was sent yesterday may not need action yet, while another that has had no response for a week and no scheduled call is a stronger warning sign.

This same connected data also supports forecasting. Active quotations linked to live opportunities give sales leaders a better view of likely future revenue than isolated spreadsheets or email-based tracking. When quotation status and opportunity stage stay current, revenue expectations become more realistic and easier to review.

[SCREENSHOT: Sales reporting view comparing quotations sent, accepted, and overdue follow-up activities]

Common Issues That Slow Quotation Follow-Up and How Teams Avoid Them

Many quotation delays are not caused by pricing alone. In **Sherkety ERP & Website Platform**, slow follow-up usually comes from avoidable habits in how sales teams prepare, send, and track quotations.

One common problem is building every quotation manually. When salespeople type products, prices, and terms from scratch, the process takes longer and mistakes are more likely. Teams avoid this by using **Quotation Templates**, saved product entries, and pricing rules so the quotation form is filled with consistent information from the start.

Another issue appears after the quotation is sent: no next action is scheduled. A salesperson may assume they will remember to call later, but busy pipelines make that unreliable. A better approach is to add a **next activity** immediately after sending the quotation. That way, the opportunity shows a visible reminder for the planned call, email, or meeting.

Teams also lose momentum when important conversations happen outside the opportunity record. If emails, meeting notes, and customer questions are kept in personal inboxes or separate documents, other team members cannot see the full story. Keeping messages, notes, and activities attached to the same opportunity preserves context and makes follow-up more consistent.

Approval delays are another frequent blocker. If the customer has to print, sign, scan, and return a document manually, response time often stretches out. Online acceptance and **eSignature** reduce this friction by giving the buyer a faster path to approval.

To avoid the most common slowdowns, teams usually focus on a few habits:

- Use templates instead of rebuilding quotations manually
- Apply saved pricing rather than retyping amounts
- Schedule the next activity before leaving the quotation
- Keep notes and communication on the same sales record
- Use online approval options whenever available

Overview

Quotation automation in **Sherkety ERP & Website Platform** helps sales teams move from pipeline discussion to customer approval without breaking the flow between **CRM** and **Sales**. The key idea is simple: the opportunity, quotation, customer communication, and follow-up activities stay connected, so the team can prepare offers faster and respond at the right time.

Across this workflow, the most important screens and actions are:

- The **opportunity** in the sales pipeline, where customer discussions and deal progress are tracked
- The **quotation form**, where you add products, quantities, prices, taxes, and a validity date
- **Optional Products** and **Quotation Templates**, which help standardize offers and support upselling
- The **Send** action, which shares the quotation directly from the record
- Online customer approval and **eSignature**, which reduce back-and-forth delays
- **Activities** such as calls, emails, and meetings, which keep follow-up visible
- Reporting views that compare sent quotations, accepted quotations, and stalled deals

If you are responsible for sales execution, this workflow gives you a clearer way to manage each offer from first draft to signed agreement. If you supervise the team, it gives you visibility into which quotations are progressing and which ones need attention.

This document focused on quotations and follow-up only. For earlier pipeline work such as handling leads, updating contact details, and moving deals through stages, refer back to Managing Leads Contacts and Sales Pipeline.

The next topic in this section is Reviewing Sales Reporting and Pricing, where you will look more closely at performance analysis and pricing visibility.

Prerequisites

Before working with quotation automation in **Sherkety ERP & Website Platform**, users should already be comfortable with the basic sales pipeline workflow. This document assumes you can open an opportunity, recognize customer and deal details, and understand how opportunities move through sales stages. If that part is still new, start with Managing Leads Contacts and Sales Pipeline.

You will get the most value from this guide if the following are already in place:

- Access to the **Sales & CRM** area
- Existing **customers** or prospects available for selection on opportunities and quotations
- A product or service list that salespeople can choose from when building quotation lines
- Pricing information ready to use in quotations
- Sales opportunities already being tracked in the pipeline

It also helps if your team is already using shared sales records instead of keeping deal details only in personal email threads or offline documents. Quotation automation works best when the opportunity record is the main place where the team logs communication, schedules activities, and checks deal progress.

For teams preparing customer-ready offers regularly, familiarity with these items is especially useful:

- **Quotation Templates** for repeated offers
- **Optional Products** for upsell choices
- Email sending from the quotation record
- Online approval or **eSignature** if your sales process uses digital acceptance
- Activity reminders for post-send follow-up

You do not need to master reporting before using quotations, but you should understand that quotation status and follow-up actions affect later sales analysis. That connection becomes more important in Reviewing Sales Reporting and Pricing.