SHERKETY BYTES ALIGN

Understanding Sales and CRM Module Value for Revenue Teams

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Exploring the Sales and CRM Workspace

When you open the **Sales & CRM** area in Sherkety ERP & Website Platform, the first things to evaluate are the screens that support the full selling cycle: the **CRM pipeline**, **Quotations**, **Sales Orders**, **customer records**, and **reporting dashboards**. These are the areas revenue teams use every day, so they should feel connected rather than scattered across separate tools.

On the CRM side, buyers should look for a **Kanban pipeline** that shows opportunities as cards arranged by stage. This layout makes it easy to scan open deals, see where work is stalled, and understand which opportunities are close to closing. A strong module page will also show that opportunities can be viewed in more than one way, such as a **list view** for sorting and filtering records. Common action buttons to watch for include **Create**, **New Quotation**, and **Convert to Opportunity** because these reveal how quickly a team can move from inquiry to active deal.

The sales side should clearly show the path from an opportunity into a quotation and then into a confirmed order. On quotation and order screens, pay attention to visible business details such as **customer name**, **product lines**, **quantities**, **unit prices**, **discounts**, and **totals**. These details tell you whether the workspace supports real selling activity, not just contact tracking.

You should also check whether customer information and reporting are part of the same experience. A useful setup lets a salesperson review **customer history**, open **quotations**, and monitor **expected revenue** without leaving the sales workspace.

[SCREENSHOT: Sales and CRM landing page showing pipeline cards, quotation list, and reporting highlights]

If you already reviewed pricing and performance indicators in Reviewing Sales Reporting and Pricing, use this page to judge how those numbers connect back to the daily screens your team will actually work in.

Identifying Which Revenue Teams Benefit Most

Different revenue teams will look at the same Sales & CRM pages in different ways. In Sherkety ERP & Website Platform, the value becomes clearer when you match each screen to the people who use it.

For **sales development** and **business development** teams, the most important area is the **CRM pipeline**. These users need to capture leads, qualify them, and move them through clear stages. A stage-based board helps them see which deals are new, which need follow-up, and which are ready to hand over. If your team works from daily outreach lists, the ability to switch from a stage board to a **list view** is especially useful for sorting opportunities and focusing on priority records.

For **account executives**, **inside sales**, and **field sales** teams, the key value is the move from opportunity to revenue. These users depend on **quotation** and **sales order** screens that show customer details, product lines, prices, discounts, and totals in one place. If your sales team regularly turns conversations into formal offers, this part of the module matters more than a simple contact database.

For **account managers** and **renewal-focused teams**, the module is most valuable when customer records include **activity history**, **scheduled follow-ups**, and ongoing relationship context. These users need to know what was promised, what was quoted before, and what next action is due.

For **sales managers** and **revenue leaders**, the strongest signals are found in the dashboards and summary views. Look for visibility into:

- **Expected revenue**
- **Win rate**
- **Sales performance by salesperson**
- **Deals by stage**
- **Order progress**

These views help leaders coach teams, review forecast quality, and spot pipeline gaps early.

[SCREENSHOT: Sales dashboard with expected revenue, stage breakdown, and salesperson filters]

If your organization includes both hunters and account managers, the best fit is a workspace where pipeline tracking, quotations, customer history, and reporting all support each role without forcing users into separate tools.

Following the Lead-to-Revenue Workflow

A strong Sales & CRM setup should make the path from first inquiry to booked business easy to follow. In Sherkety ERP & Website Platform, buyers should review whether the workflow feels continuous across the screens, not broken into disconnected steps.

The process starts with a **lead**. From there, the lead should be reviewed, qualified, and moved into the **CRM pipeline** as an active opportunity. In the pipeline, look for visible stage movement and practical actions such as assigning a **salesperson** and scheduling the **next activity**. These details matter because they show whether the team can keep ownership clear and avoid missed follow-up.

Once an opportunity is qualified, the next step should be creating a **quotation** directly from that sales work. On the quotation screen, check whether the form includes the business details a rep needs to send a real offer:

- **Customer**
- **Product lines**
- **Quantity**
- **Unit Price**
- **Discount**
- **Validity Date**
- **Totals**

This is where many teams lose time if they have to re-enter information from emails or spreadsheets. A connected workflow reduces that friction.

After the quotation is prepared, buyers should look for clear status changes that reflect the real sales cycle. Useful status progression usually includes:

- **Draft Quotation**
- **Sent Quotation**
- **Confirmed Sales Order**
- **Completed Order**

These status labels help everyone understand where a deal stands without asking for updates manually. Managers can see whether a deal is still being negotiated, already accepted, or fully completed.

The business value of this flow is practical:

- Faster follow-up after qualification
- Fewer handoff gaps between pipeline and quoting
- Clearer deal status for reps and managers
- Better visibility into what is likely to book

[SCREENSHOT: Opportunity record linked to a quotation with visible status and customer details]

This workflow builds on the sales concepts introduced in Understanding Quotations Automation and Follow Up, but here the focus is whether the full chain supports revenue execution from start to finish.

Evaluating the Business Outcomes the Module Supports

When buyers evaluate Sales & CRM pages, the goal is not only to confirm that the screens exist. The more important question is what those screens help a revenue team achieve. In Sherkety ERP & Website Platform, several visible features point directly to business outcomes.

A **Kanban pipeline** with stage tracking supports better forecasting because each opportunity is tied to a visible sales stage. When the opportunity also shows **expected revenue** and a likelihood of closing, managers can judge pipeline quality instead of relying on guesswork. This is especially useful during weekly forecast reviews, where leadership needs to know which deals are moving and which are slipping.

On the sales document side, reusable **customer records**, product details, and pricing on **quotations** reduce repeated manual work. Reps do not have to rebuild the same offer from scratch every time. If the quotation screen clearly displays product lines, prices, discounts, and totals, that is a strong sign the module can shorten quote turnaround time and improve consistency across the team.

Follow-up tools also matter. Look for signs that the workspace supports:

- **Scheduled activities**
- **Call logging**
- **Email follow-ups**
- **Opportunity history**

These features improve accountability because each rep can see what happened last and what needs to happen next. They also help managers coach based on real activity rather than memory.

Finally, dashboards and reporting views should help leaders monitor performance at a glance. Useful indicators include:

- **Conversion rates**
- **Average deal value**
- **Revenue by salesperson**
- **Pipeline by stage**
- **Order totals**

[SCREENSHOT: Reporting area showing pipeline metrics and sales performance summaries]

If you already reviewed metric-focused pages in Reviewing Sales Reporting and Pricing, use this section to decide whether those reports are supported by enough day-to-day workflow structure to produce reliable numbers.

Comparing the Module to Your Current Sales Process

The easiest way to judge fit is to compare the Sales & CRM pages in Sherkety ERP & Website Platform with how your team works today. Instead of asking whether the module looks modern, compare it against the exact records, actions, and handoffs your team depends on.

Start with your current tools for **lead tracking** and **opportunity management**. If your team uses spreadsheets, email threads, or separate CRM and quoting tools, check whether Sherkety ERP & Website Platform brings those tasks together. The interface should make it clear that reps can manage **lead records**, move deals through **opportunity stages**, create **quotations**, confirm **sales orders**, and review **customer interaction history** in one connected workspace.

As you review the page, answer practical questions such as:

- Can reps move deals through defined stages?
- Can managers see **expected revenue** by stage?
- Can quotes be created directly from opportunities?
- Can a **salesperson** be assigned clearly?
- Is the **customer** visible on every key sales record?
- Can users track an **expected closing date**?
- Are **quotation status** and **order totals** easy to read?
- Do reports include useful **filters** for reviewing performance?

These checks help you compare the module to your sales model, not to a generic feature list.

You should also think about the type of revenue motion your business uses. The module may be a better fit if your team depends on:

- **New business acquisition** with active pipeline management
- **Account-based selling** with customer-specific follow-up
- **Recurring follow-up** across longer deal cycles
- **Manager-led forecasting reviews** based on stage and expected revenue

[SCREENSHOT: Opportunity list with salesperson, customer, expected closing date, and stage filters]

A strong fit usually means fewer disconnected tools and less manual updating between pipeline review, quotation preparation, and order confirmation.

Spotting Signs the Module Fits Your Revenue Team

As you review the Sales & CRM pages, certain interface details are strong signs that Sherkety ERP & Website Platform matches the needs of a revenue team. These signs are easy to spot because they appear directly in the screens your users would work with every day.

Look first at the **pipeline**. If your team actively manages deals from stage to stage, the best sign is a clear board with editable stages and **drag-and-drop** opportunity movement. This tells you reps can update deal progress quickly during daily work instead of waiting for end-of-week cleanup. A pipeline that is easy to scan also helps managers run faster deal reviews.

Next, review the **quotation** and **sales order** screens. If your team needs a direct path from opportunity to booked revenue, the forms should clearly show:

- **Customer details**
- **Product lines**
- **Pricing**
- **Taxes**
- **Totals**

When these details are visible in one place, it is easier to confirm that the module supports real commercial activity rather than basic contact tracking.

Leadership teams should focus on the dashboard and reporting views. Good fit is usually obvious when the page includes:

- **Expected revenue**
- **Stage-based reporting**
- **Salesperson filters**
- **Performance summaries**

These views are especially important if your managers want forecast visibility without exporting data into separate reporting files.

Finally, check whether customer records include a timeline of interactions and planned follow-up. If your team relies on structured relationship management, look for:

- **Scheduled activities**
- **Communication history**
- **Customer-specific records**
- **Opportunity history**

[SCREENSHOT: Customer and opportunity view with follow-up activity and linked sales documents]

When these signs appear together, the module is usually well suited for teams that need visibility, accountability, and a smooth path from first contact to confirmed sale. The next document, Exploring Sales Pipeline and Customer Management Workflows, goes deeper into how those day-to-day screens support active selling.

Overview

Sherkety ERP & Website Platform presents the **Sales & CRM** module as a connected workspace for revenue teams that need to manage opportunities, prepare quotations, confirm orders, and monitor sales performance from one place. For buyers, the value is easiest to understand when you review the screens as one continuous flow instead of treating CRM, quotations, and reporting as separate topics.

At a high level, the module brings together four core working areas:

- **Pipeline management** for tracking leads and opportunities by stage
- **Sales documents** for preparing quotations and confirming orders
- **Customer records** for keeping account history and follow-up context
- **Dashboards and reports** for monitoring expected revenue and team performance

This matters because revenue teams often struggle when these activities are split across multiple tools. A salesperson may track the deal in one place, build the quote in another, and report progress somewhere else. In Sherkety ERP & Website Platform, buyers should look for signs that those handoffs are reduced through shared records, visible statuses, and connected actions such as **Create**, **New Quotation**, and **Convert to Opportunity**.

This document focuses on business value rather than setup. It helps you judge whether the module supports the way your team sells, follows up, and forecasts. If you need a broader introduction to the module before evaluating fit, start with Exploring Sales and CRM Overview. If you want more detail on lead handling and pipeline structure, see Managing Leads Contacts and Sales Pipeline.

[SCREENSHOT: Sales & CRM page showing pipeline, quotation access, customer records, and reporting entry points]

Use this page as a buying lens: not just “what features are listed,” but “can our revenue team work from these screens every day with less friction and better visibility?”

Prerequisites

You do not need admin access or a technical background to evaluate the Sales & CRM module in Sherkety ERP & Website Platform, but you will get more value from this document if you already know the basic sales terms used across the pages. In particular, it helps to recognize the difference between a **lead**, an **opportunity**, a **quotation**, and a **sales order**, because the module is organized around that progression.

Before using this guide, it is helpful if you have already reviewed:

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

Those pages explain the basic screens and terms. This document builds on them by helping you decide whether the module is a good fit for your revenue team.

As you read, it helps to have your own sales process in mind. You will get the clearest result if you can compare the module against a few familiar items from your current workflow, such as:

- Your current **pipeline stages**
- How your team prepares **quotes**
- Who owns **follow-up**
- How managers review **forecast numbers**
- What customer details reps need before sending an offer

If you are evaluating the module for a team discussion, gather examples of the fields and statuses your team already uses, such as **salesperson**, **customer**, **expected closing date**, **quotation status**, and **order total**. These are the same kinds of details you should look for on the Sales & CRM pages.

[SCREENSHOT: Sales & CRM evaluation checklist view with pipeline, quotations, orders, and reporting areas highlighted]

With that context in mind, you can use the sections above to compare Sherkety ERP & Website Platform directly against your team’s daily selling and forecasting needs.