CRM
Lead State
Lead Source (e.g. Tradeshow, Cold Calling)
Lead Program (e.g. Product Line, Account Type)
Q1 Q2 Q3 Q4
100% 90% 80% 70% 60% 50% 40% 30% 20% 10%
Projected Conversion Date
Projected $ Value Of Winning Account
Probability Adjustment
Sales Pipeline
Notes / Knowledge Base (Sales Collaboration)
Reminders / Followups
Calendar Integration
“Last Touched” Tracking
Activate As Customer
Leads / Opportunities
Qualification
Momentum
Quoting
Close
Customizable Funnel
Assignments / Responsibilities
Email Triggers / Alerts / Reminders
Workflow History
Opportunity State
Opportunity Type (e.g. Product Line)
Opportunity Probability Adjustment
Target Dates 1, 2, 3, 4, 5
Projected Sales Quantity
Projected Unit / Ext. Resale
Product
Opportunity Pipeline
Notes / Knowledge Base (Sales Collaboration)
Reminders / Followups
Calendar Integration
“Last Touched” Tracking
Activate As Customer
Quote Per Customer Opportunity
Quotes
Quote Workflow State (e.g. Sales, Engineering, Purchasing)
Send Quote PDF To Customer
Q1 Q2 Q3 Q4
Projected Conversion Date
Projected $ Value Of Winning Account
Quote Probability Adjustment
Quote Pipeline
Notes / Knowledge Base (Sales Collaboration)
Reminders / Followups
Calendar Integration
“Last Touched” Tracking
Convert To Order (Track Conversion %)
Reconcile Quote (Track Reason Codes)
Customer Service
Customer Record Account Type) (Contacts, Addresses, History, etc.)
Documents / Paperwork
Check Status Of Customer Order
Open A Customer Case (Complaint, Feedback, etc.)
Issue An RMA
Track Customer Warranty Information
Re-issue Shipping Docs, Invoices, etc.
Customer Portal
Submit RFQs
Track Shipments
Order Status
AR Statement
Quoting, Estimating, And MFG Modes Flowchart
Check PDF
Packing, Shipping, Invoicing Flowchart
Check PDF
Invoicinga/r Payments Flowchart
Check PDF