CRM
Lead State
Lead Source (e.g. Tradeshow, Cold Calling)
Lead Program (e.g. Product Line, Account Type)
Projected Conversion Date
Projected $ Value Of Winning Account
Probability Adjustment
Q1
Q2
Q3
Q4
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
Projected Conversion Date
Projected $ Value Of Winning Account
Quote Probability Adjustment
Q1
Q2
Q3
Q4
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
Order Status
Track Shipments
AR Statement
Quoting, Estimating, And MFG Modes Flowchart
View PDF
Packing, Shipping, Invoicing Flowchart
View PDF
Invoicing & A/R Payments Flowchart
View PDF