

SAMPLE SAGECRM - CASE WORKFLOW DIAGRAM
USE CASES TO TRACK WORK ORDERS

Status
New
In Process
Complete

Stages
Customer Drawings
Drawings Needed
Drawings in Process
Drawings Need Approval
Drawings Approved
Drawings Need Revision
Waiting on Main Drawing
Released for Production
Assembly Completed
Shipped
Ready to Bill

Engineering Group =
Bob
Chris
Dave D.
Tina

Engineering will get a copy of the Sales Order
Engineering will pull up the Opportunity in CRM
And Right-Click on NEW and select NEW WORK ORDER
Create a Case for each Work Order
The Link to Opportunity field will automatically
Be populated with the proper Opportunity
Status = New
Stage = Drawings Needed
Email sent to Engineering Group
[Workflow Options](#)
Started Drawings
Customer Drawings (Jumps to Release for Production)
Wait on Main Drawing (Jumps to Release for Prod)

Started Drawings
Status Changed = In Process
Stage Changed = Drawings in Process
[Workflow Options](#)
Drawings Complete – Need Approval
Engineering attaches PDF drawing to Case

Drawings Complete – Need Approval
Stage Changed = Drawings Need Approval
Engineer attaches PDF to Documents Tab of Case
for Salesperson to Review
Send email to Engineer and Notify Person(s)
[Workflow Options](#)
Drawings Approved
Drawings Not Approved/ECO

DRAWINGS NEED APPROVAL:
Onscreen Notifications appear in CRM for
the Notify Persons 1&2

Email Reminders get sent to Notify
Persons 1&2 every 4 hours between 7am
and 6pm on weekdays

Drawings Approved
Stage Changed = Drawings Approved
Send Email to Engineering and Notify Person(s)
[Workflow Options](#)
Released for Production

Drawings Not Approved
Stage Changed = Drawings Need Revision
Send Email to Engineering and Notify Person(s)
[Workflow Options](#)
Drawings Complete – Need Approval

Released for Production
Stage Changed = Released for Production
Send Email to Engineer and Notify Person(s)
[Workflow Options](#)
Assembly Completed
Engineering Change Order (Goes back to Drawings Needed)

Assembly Completed/Shipped
Stage Changed = Assembly Completed
Send Email to Notify Person(s)
Send email to Sue and Kimm
[Workflow Options](#)
Billing

Billing
Stage Changed = Ready to Bill
Send email to Sue and Kimm
[Workflow Options](#)
Closed

Closed
Stage Changed = Closed
Status Changed = Complete