

**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**