

Example of a SageCRM Sales Opportunity Workflow

Right-Click on NEW button.
Select System Opportunity

New System Opp Screen
Opportunity Type = System
Stage = Project Identified
Status = In Progress
Certainty = 25%
Close Date = +90 days

Salesperson fills out the following fields:
Customer Project Ref Name/NumProject Description
Project Details
Source
Source Detail
System Type (multiselect)
Estimated Value

Workflow Option = Quoting in Progress
Set Stage To = Quoting in Progress
Prompt for Value, Certainty and Close Date

Workflow Option = Quote Presented
Set Stage To = Quote Presented
Prompt for Value, Certainty and Close Date
Follow-up Call created in SageCRM for 24 hours later

Workflow Option = Capital Approval Process
Set Stage To = Capital Approval Process
Prompt for Value, Certainty and Close Date
Email Notification sent to Company President

Workflow Option = Verbal Commitment
Set Stage To = Verbal Commitment
Prompt for Value, Certainty and Close Date
Email Notification sent to President if > \$10k
ToDo with Onscreen Reminder set for 1 week later:
"Have we received the PO Yet?"

Status Updates that will be available at each stage

Opportunity is WON

Change the Status to WON
Send an email to Executives if deal > \$10k
Merge to Word based Thank You Letter.

Opportunity LOST

Change the Status to Lost
Send an email to Executives
Prompt Salesperson to enter in data into Reason Lost field

Opportunity is INACTIVE

Change the Status to Inactive
Pull up a Follow-up Call screen and prompt salesperson to create a follow-up call