Manage Sales Pipelines and Follow-ups (CRM Sales Workflow)

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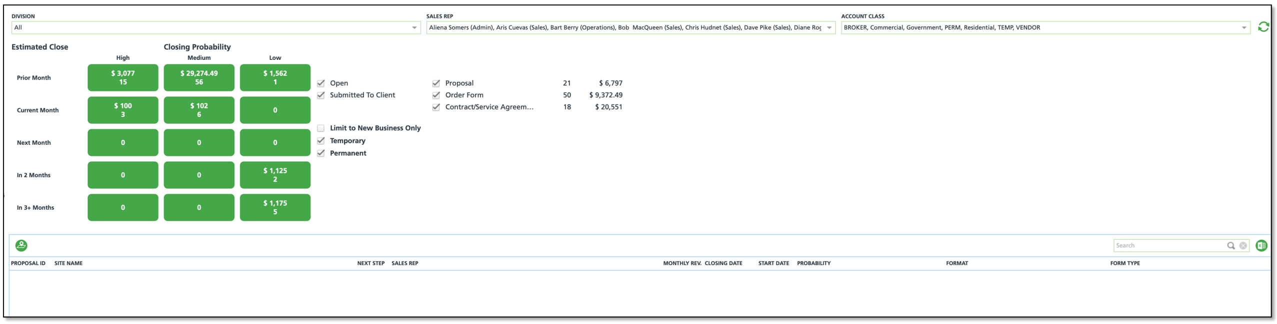
This article provides details and links about tools and features that can help you manage your sales pipeline.

Prerequisites:

Review the following articles to better understand the sales workflow leading up to sales pipeline management:

1. Create Prospect Accounts and Leads
2. Proposals and Service Contracts

Sales Management Tools



Pipeline Dashboards

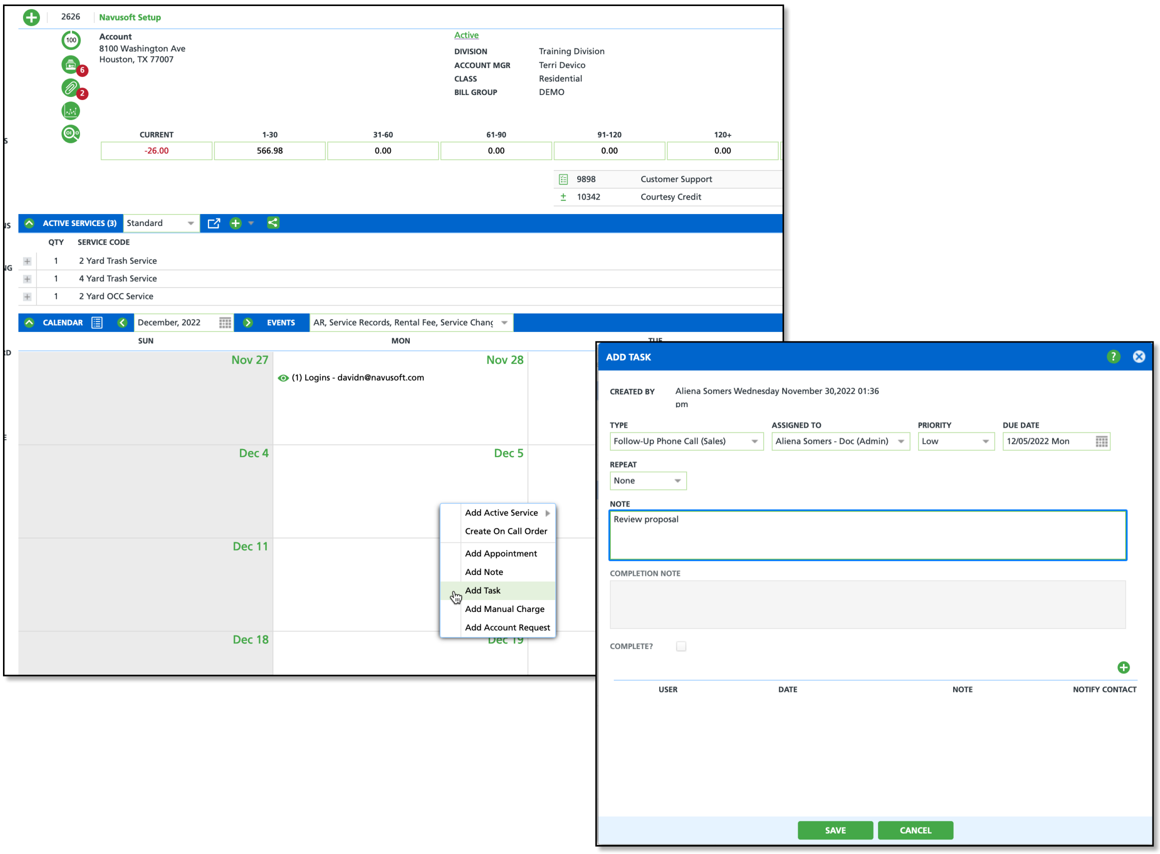
Pipeline dashboards offer a well-structured, visual representation of real-time sales data across various stages of the sales process. By utilizing the filtering features within each dashboard, users can focus on specific data sets, enabling them to predict and set sales objectives more effectively.

Article Links

Article	Description
Pipeline Summary	The Sales Pipeline Summary tool provides an overview of the data reported within each of the Pipeline Dashboards.
Pipeline Leads	The Pipeline Leads tool is specifically designed to monitor potential customer accounts that are currently categorized as leads, without having progressed to the stage of receiving a proposal, quote, or contract.
Pipeline Opportunities	The Pipeline Opportunities tool is utilized for monitoring and effectively managing prospects who have already received a proposal. Additionally, it incorporates a projected revenue figure based on the quoted services, enabling accurate revenue forecasting.

Communication and Followup

The Navusoft application offers a variety of tools designed to facilitate the management of follow-up calls and meetings with potential customers. Review the provided links to learn more about each tool's functionalities.



Article Links

Article	Description
Add Appointment	To avoid double-booking and ensure timely reminders for upcoming calls and meetings with a prospect account, it is recommended to schedule an appointment in advance.
Add Task	To stay organized and on top of your to-do list items, consider adding tasks to prospect accounts. This helps ensure that you remain on track and effectively manage your responsibilities.
Add a Note	Notes offer an alternative way to document important information and interactions with prospective customers, eliminating the need to create an appointment or task. They provide a convenient option for recording relevant details and maintaining a record of customer interactions. *Notes only display on the account's calendar for the day it was added and do not generate followup notifications.*
Email	Use the Send Email feature located in the Customer Service screen to follow-up and stay in communication with customers.