

## USER DOCUMENTATION

### Introduction

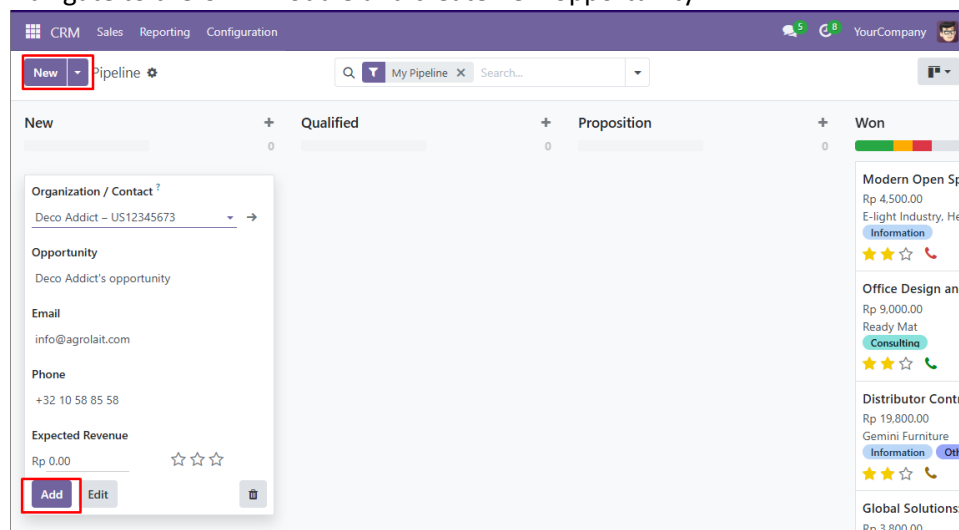
This document explains how to use the new feature to automatically or manually update an opportunity stage to the “Won” stage when the quotation is confirmed as a sales order.

### Steps to Use the New Feature

Before updating opportunity from Sales module, we should create a quotation record that linked with opportunity record. This can be done from the opportunity record.

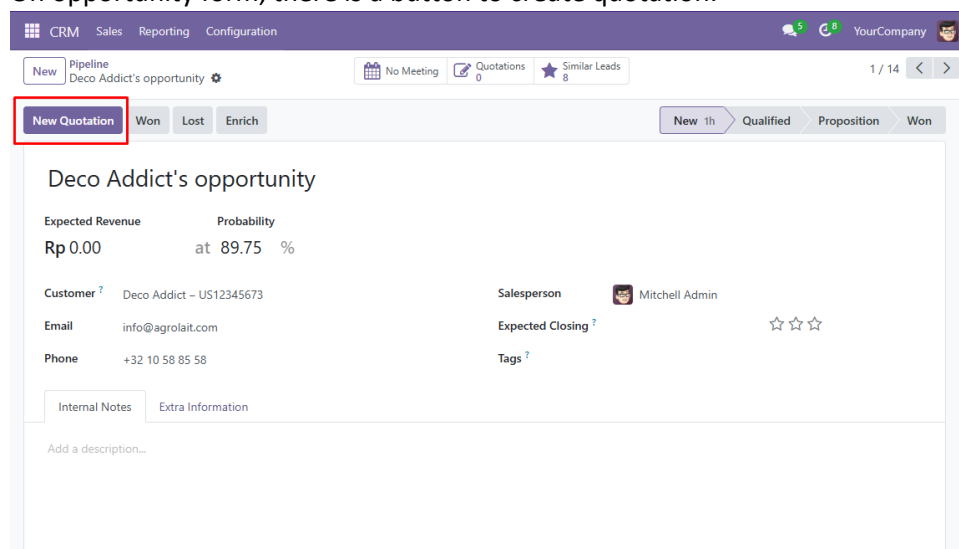
#### 1. Create a new quotation from opportunity

- Navigate to the CRM module and create new opportunity



The screenshot shows the CRM interface with a 'New' button highlighted in a red box. Below it, a form for creating a new opportunity is displayed. The form includes fields for 'Organization / Contact', 'Opportunity', 'Email', 'Phone', and 'Expected Revenue'. The 'Add' button at the bottom of the form is also highlighted in a red box. The background shows a pipeline view with stages: New, Qualified, Proposition, and Won.

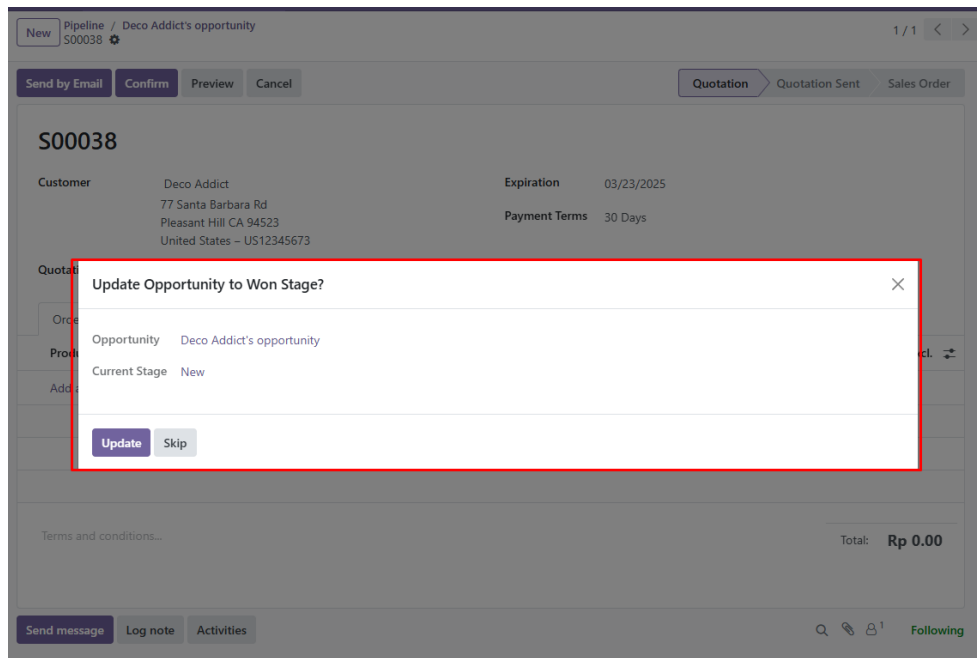
- On opportunity form, there is a button to create quotation.



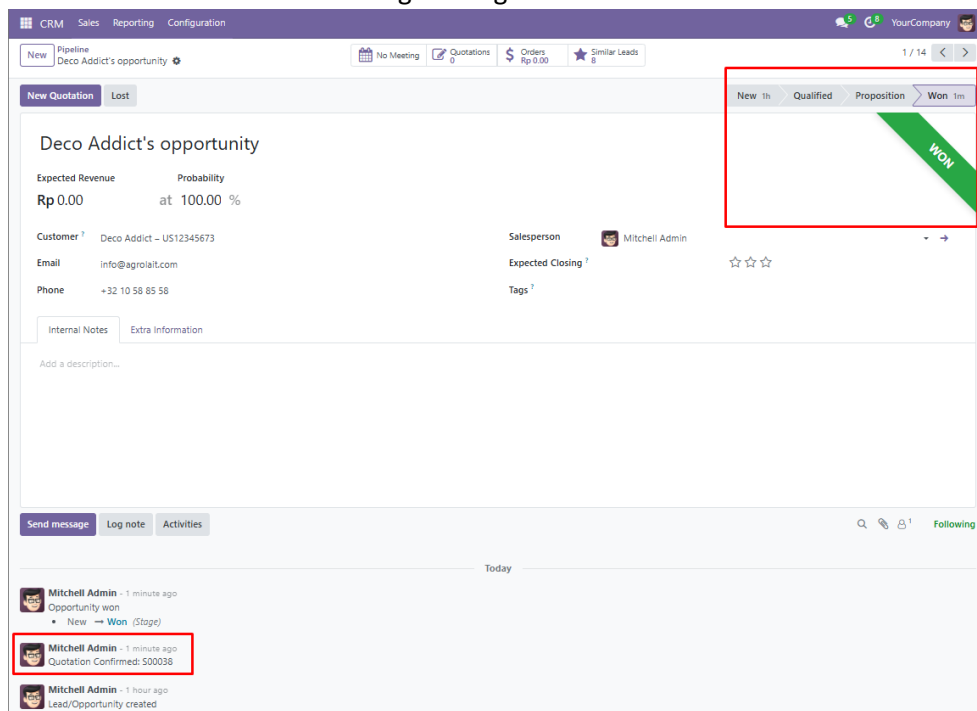
The screenshot shows the CRM interface with the 'Deco Addict's opportunity' form. The 'New Quotation' button is highlighted in a red box. The form displays details for the opportunity, including Expected Revenue (Rp 0.00), Probability (89.75 %), Customer (Deco Addict - US12345673), Salesperson (Mitchell Admin), and Expected Closing. The background shows a pipeline view with stages: New, Qualified, Proposition, and Won.

#### 2. Update the opportunity stage into 'Won' stage automatically

- Open the quotation record and confirm it. There will appear popup confirmation to update the opportunity stage into 'Won' stage. Click 'Update' button.

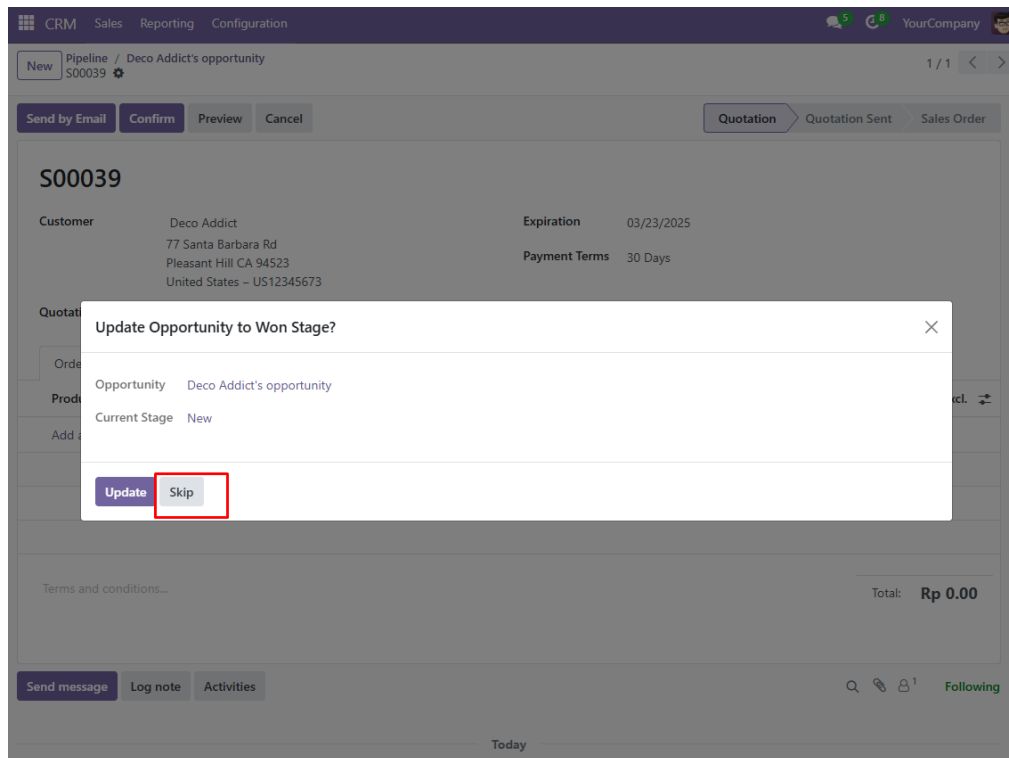


- The opportunity stage already updated into 'Won' stage and the quotation confirmation also recorded on log message.

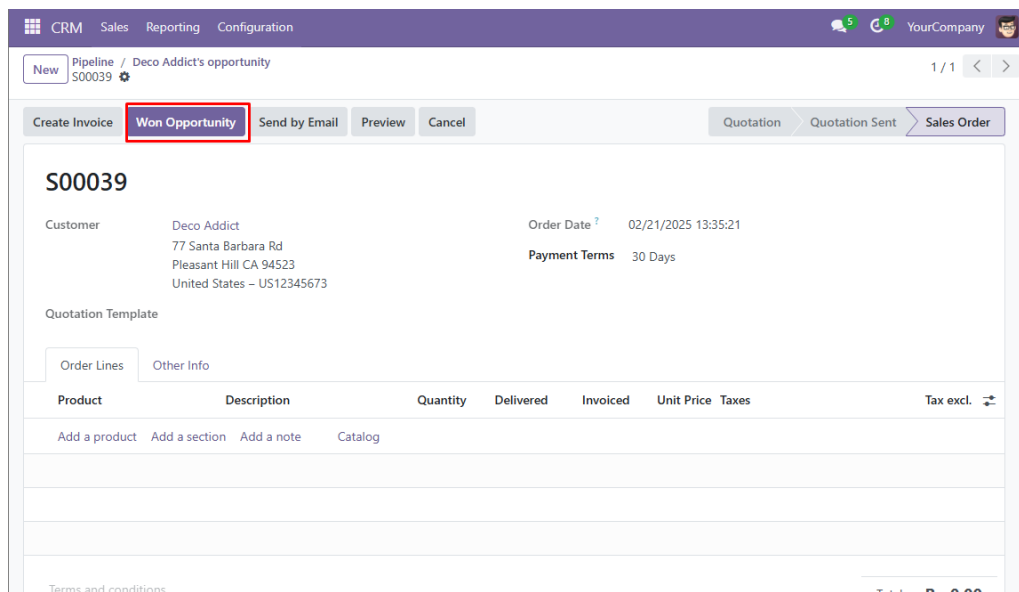


### 3. Update the opportunity stage into 'Won' stage manually after quotation confirmation

- Open the quotation record and confirm it. There will appear popup confirmation to update the opportunity stage into 'Won' stage. Click 'Skip' button. This will not update the opportunity stage automatically.



- On the quotation record, there will show a 'Won Opportunity' button. Click it.



- Once 'Won Opportunity' button clicked, the opportunity stage updated into 'Won' stage and the quotation confirmation also recorded on log message.

CRM Sales Reporting Configuration

New Pipeline

Deco Addict's opportunity

No Meeting

Quotations0

OrdersRp 0.00

Similar Leads9

10 / 15

New Quotation

Lost

New6m

Qualified

Proposition

Won1m

Deco Addict's opportunity

Expected Revenue

Rp 0.00

Probability

at 100.00 %

Customer?

Deco Addict - US12345673

Email

info@agroiait.com

Phone

+32 10 58 85 58

Salesperson

Mitchell Admin

Expected Closing?

☆☆☆

Tags?

Internal Notes

Extra Information

Add a description...

Send message

Log note

Activities

Following

Today

Mitchell Admin - now

Opportunity won

New → Won (Stage)

Mitchell Admin - now

Quotation Confirmed: S00039

Mitchell Admin - 7 minutes ago

Lead/Opportunity created