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| **Enquiry**  **Process Flow >>>>>>** | |
| **Enquiry Received** | **Enquiry created in system** | **Enquiry enters ticket funnel** | **Enquiry gets assigned to a sales exec.** | **Client created (if new client)** | **Enquiry Updated (if necessary)** | **Enquiry Converted to an Estimation Project or Purchase Order (See Estimation or PO Flow for further process)** |
| By Sales Exec | By sales exec. | Sales exec’s own funnel (visible to exec’s sales manager, branch head and BD Head) | N/A | By sales exec. | By sales exec. (see. Excel sheet for other roles which can update) | By sales exec. (see. Excel sheet for other roles which can update) |
| Non-personal:  e.g.  SoMe  Mail  Website | By admin / automatically via website / by customer exec | Unassigned enquiries (enters the Branch Head and sales manager’s funnel based on client’s geographic location e.g. enquiry by Delhi based client enters funnel of Delhi Sales Manager/Branch head) | By sales manager or branch head | By sales exec. | By sales exec. (see. Excel sheet for other roles which can update) | By sales exec. (see. Excel sheet for other roles which can update) |
|  |  |  |  |  | REMEMBER: Putting notes and a deadline/timed reminder on an enquiry has to be a feature |  |

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| **Estimation**  **Process Flow >>>>>** | | | |
| **1. Estimation created**  **or converted from enquiry** | **2. Unassigned Estimation enters Estimation manager’s funnel** | **3. Estimation assigned to Estimation exec.** | **4. Estimation fleshed out with products, specs and prices, etc** | | **4.1 Request for further information** | **4.2 Request for Quotation by vendors** | **5. Estimation sent for approval** | **6. Estimation review** | **7. Estimation Approved** |
| By sales exec. | Est. Manager can view and edit estimation | By estimation manager | By estimation exec. (prices auto-populate on standard products) | | By estimation exec | By estimation exec. | By estimation exec | By Estimation manager | By Estimation Manager |
|  |  |  |  | | NOTE: If the information insufficient to create an estimate exec can request further info from the sales exec | NOTE: Next to each product on the Estimation there has to be an option to Request for Quotation which opens an email and puts associated vendors in BCC and specs in the mail body to be sent for quotation |  | NOTE: Estimation can be sent back to the estimation exec. To be reworked and also sent to a new estimation exec to be worked on. Hence step 4-6 can repeat multiple times possible with different estimation executives. |  |