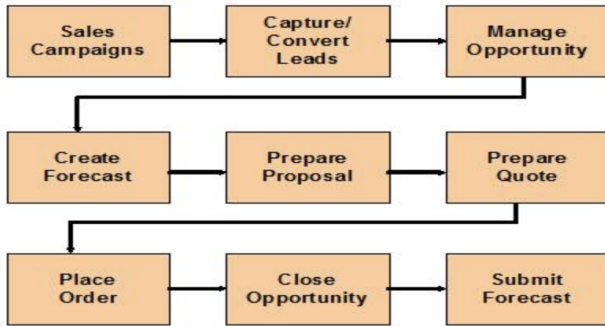# Lead to Order Process

Sales Flow

Sales Campaign

- Create and manage Campaigns.
- One campaign can have multiple schedules attached to it.
- The selling product can be attached to the campaign.
- We can also have a target list of customers for a particular campaign. This list can be either an external or internal list of customers.
- Once the campaign is launched the leads generated through it can be captured and followed up.

Convert/Capture Leads

A lead is an expressed customer interest that a sales agent uses to determine whether there is potential for a sales opportunity. Leads are intended to capture the initial contact with potential or existing customers, gathering just enough information to tell a sales organization whether there is sufficient interest on behalf of the buyer to make a lead worth following up.
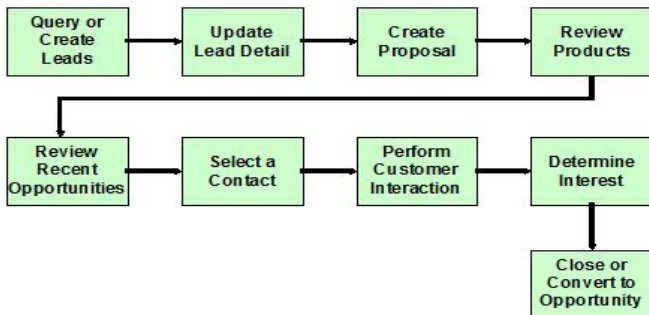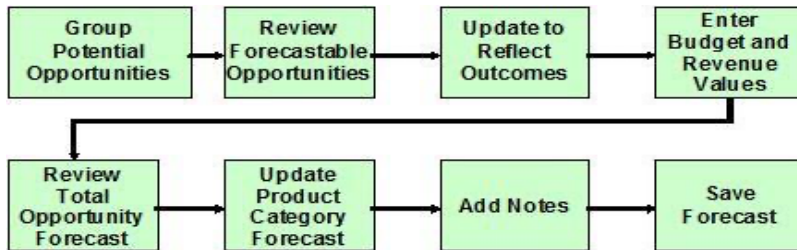

Manage Opportunities

An opportunity is a sales deal that can be forecast. Opportunity management is used to track information about the products that a customer has expressed an interest in buying. Opportunities differ from leads because the expected revenue from the sale can be tracked, as can the likelihood of closing the deal. Opportunities can also be used as the basis for allocating sales credits towards quotas, and can be converted into quotes
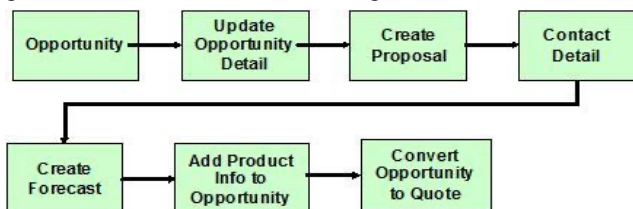
Create Forecast

Forecasting is a quantitative tool used to predict the amount of sales for a specified time period. Forecasting can be used by individual sales representatives or in a consolidated form by managers, to commit to the amount of sales that they predict will close by the end of the forecasting period.

```
Group Potential Opportunities → Review Forecastable Opportunities → Update to Reflect Outcomes → Enter Budget and Revenue Values
→ Review Total Opportunity Forecast → Update Product Category Forecast → Add Notes → Save Forecast
```
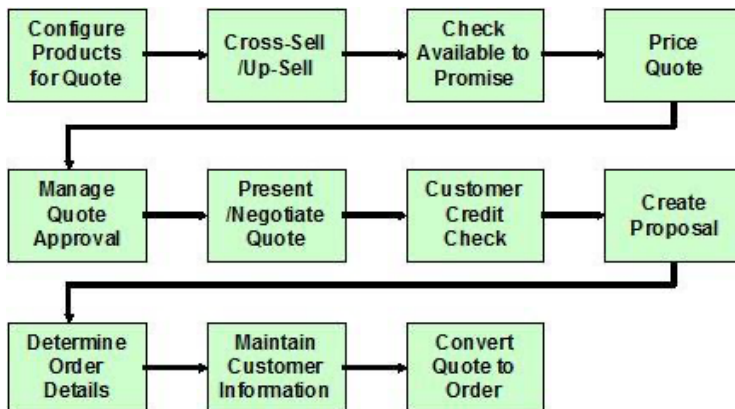
Prepare Proposal

You create proposals to position a product or service as a possible solution to a customer's business need. The creation of proposals is based on pre-determined templates, allowing you to use pre-existing content, and standardized document layouts, as well as information already stored in the database during the sales cycle.
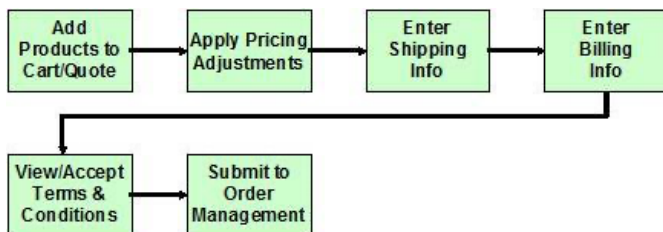
Prepare Quote

Quoting functionality provides sales agents with the ability to communicate prices, discounts, and special offers that are associated with an item which is part of a sale.

ERP calculates and stores the price of each item, estimates any associated shipping and tax costs, and when the order is placed it passes this information to Order Management which then determines how the order will be fulfilled.

```
Configure Products for Quote → Cross-Sell /Up-Sell → Check Available to Promise → Price Quote
→ Manage Quote Approval → Present /Negotiate Quote → Customer Credit Check → Create Proposal
→ Determine Order Details → Maintain Customer Information → Convert Quote to Order
```

Place Order

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Add Products to Cart/Quote → Apply Pricing Adjustments → Enter Shipping Info → Enter Billing Info
→ View/Accept Terms & Conditions → Submit to Order Management
```

Close Opportunity

To close the opportunity on the Update Opportunity Page, choose a close status in the Status field, choose a Close Reason, and save the changes.

Submit Forecast

After editing the desired forecast values, users can submit the forecast to the sales manager. It helps to determine the difference between a salesperson's forecast and the actual pipeline for that product category, which can indicate that a forecast is incorrect.