

CRM User Scenario: A Complete Walkthrough

A step-by-step guide to managing customer relationships from lead capture to quotation creation.

Who This Guide Is For

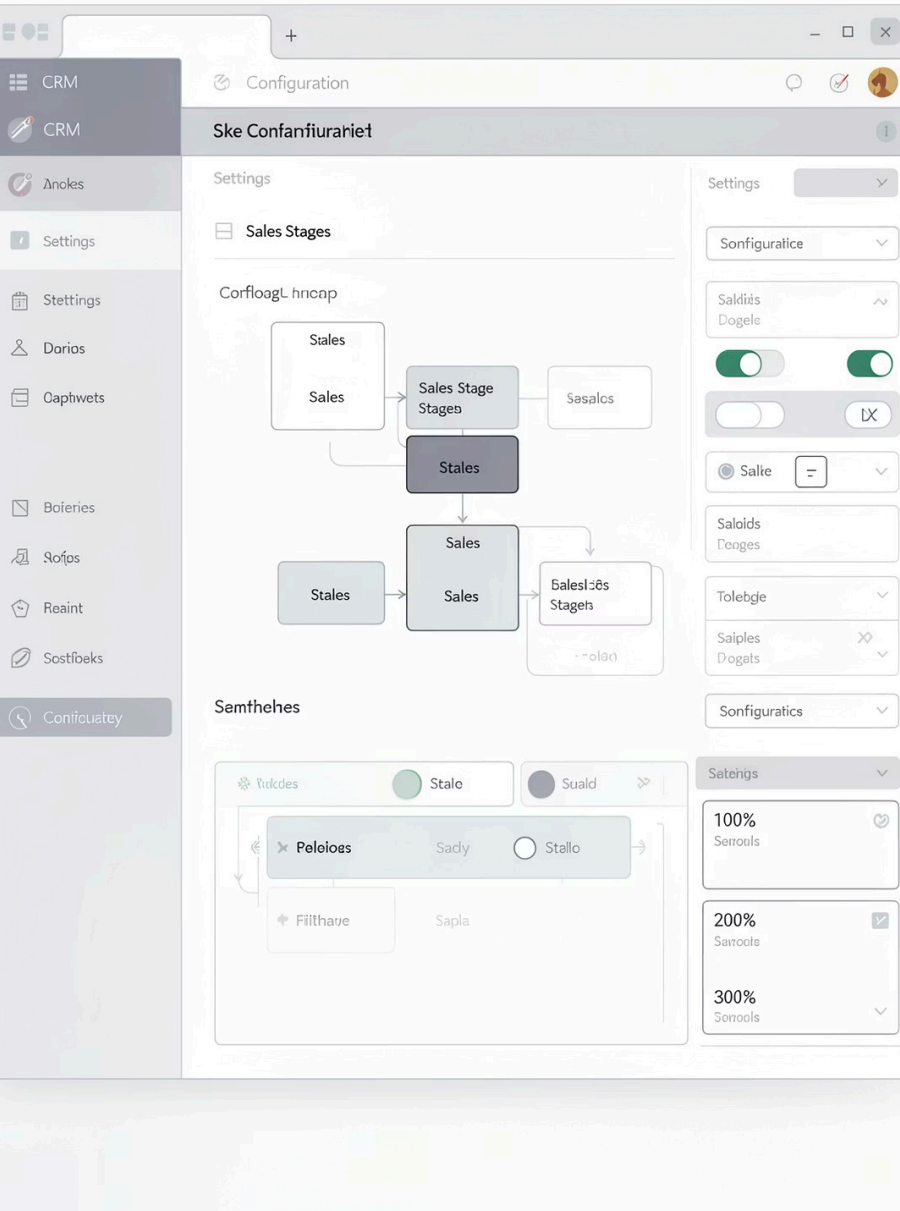


Your Role

CRM Administrator or Sales Representative

Primary Goal

- Enter and qualify leads
- Convert leads to opportunities
- Create quotations from opportunities
- Track pipeline progress



Prerequisites



Sales Stages Configured

Lead status and opportunity stages must be set up in your CRM system.



Access Permissions

Ensure access to Leads, Opportunities, Customers, activities, and quotations.

Step 1: Open CRM Workspace

Action Required

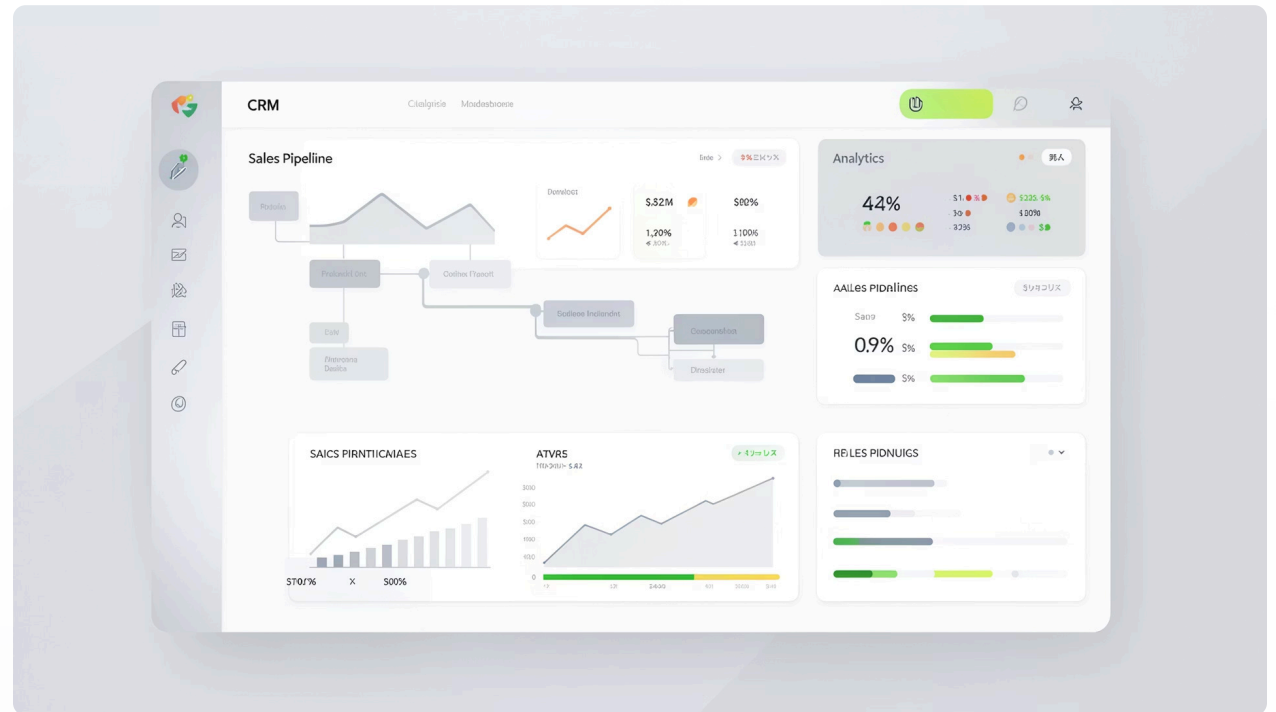
Launch your CRM workspace from the main application menu.

Expected Result

CRM shortcuts and pipeline dashboard appear on screen.

Reference Image

CRM_01_WORKSPACE.png



Step 2: Create a New Lead

01

02

Open Lead Module

Navigate to Leads and click "New" to create a record.


Enter Details

Add name, phone, email, source, and relevant notes.

03

Save Record

Click Save to create the lead in your system.

 **Expected Result:** Lead appears in the leads list. **Reference:** CRM_02_LEAD_CREATED.png

CRM

🔍 星仙か口玉ク

Filld Contomet (🔗 宸の補い)

▼

凝る々

キカゼーソト

ぐねななれ

☒ CEUか情袈会

☐ た夫いの用

☒ 候用侘震切

☒ どくた膝

〇の利レ

Step 3: Qualify the Lead



Update Status

Change lead status to "Qualified" or "In Progress."

Schedule Follow-up

Set a date for the next activity or follow-up task.

Expected Result

Qualification status and follow-up activity appear on the record.

Reference Image

CRM_03_LEAD_QUALIFIED.png

Step 4: Create an Opportunity



From Lead

Click "Create" then select Opportunity from the lead record.



Set Details

Enter expected close date and probability percentage.



Save Record

Click Save to create the opportunity linked to the lead.



Expected Result: Opportunity is created and linked to the lead.

Reference: CRM_04_OPPORTUNITY_CREATED.png

Sales Sales

Opportunity

Exgørabbiity

Probibility

Close Date

Step 5: Convert to Customer

When to Convert

When the lead shows serious buying intent, create or link an existing customer record.

How to Convert

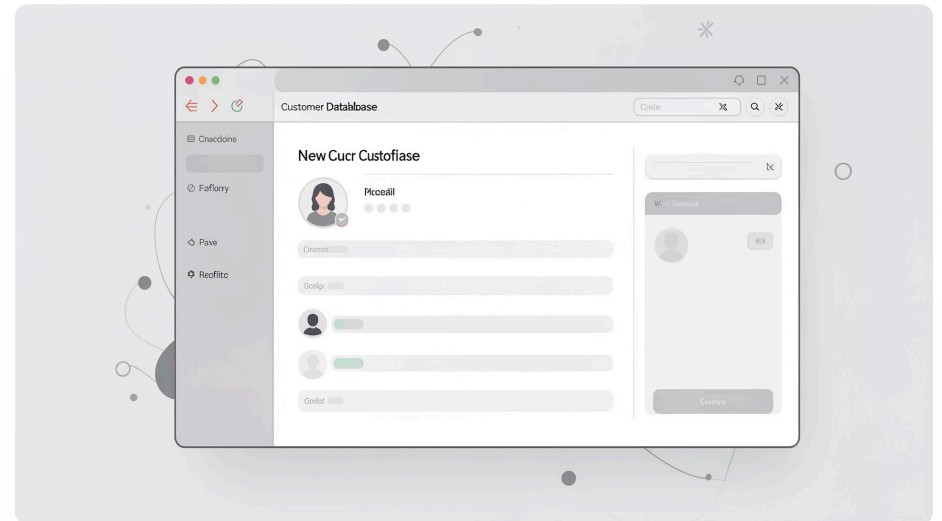
From the lead or opportunity, select "Create Customer" or link to an existing customer.

Expected Result

Customer record is created or linked for use in sales documents.

Reference Image

CRM_05_CUSTOMER_CREATED.png



Step 6: Generate Quotation



From Opportunity

Navigate to Opportunity and click "Make" then select Quotation.



Add Items

Include products, services, pricing, and terms in the quotation.



Save & Approve

Click Save then Approve to finalize the quotation.



Expected Result: Quotation is created and linked to the CRM record (Lead/Opportunity/Customer). **Reference:** CRM_06_QUOTATION_CREATED.png

Step 7: Verify Pipeline & Final Results

Review Pipeline

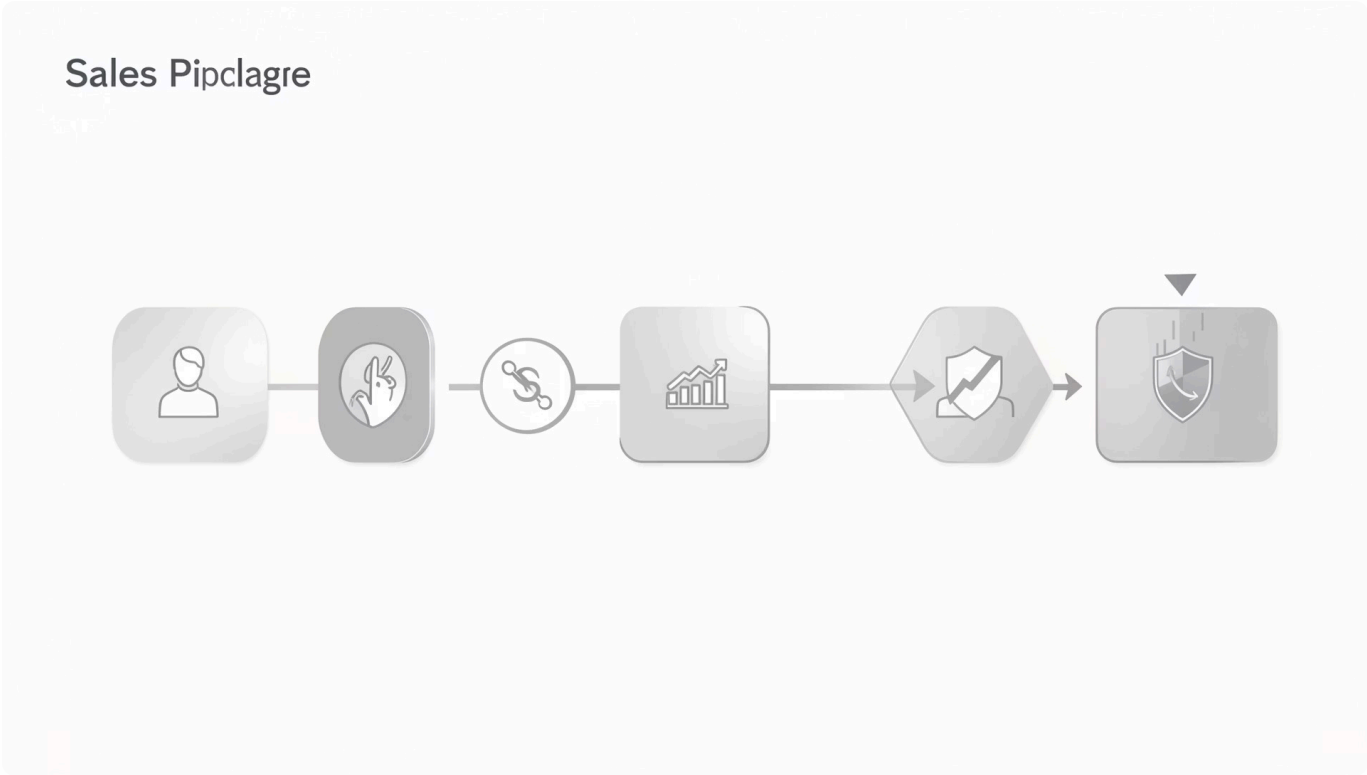
Return to CRM workspace and check the opportunity stage and expected value.

Expected Result

Pipeline updates showing correct stage and expected value.

Reference Image

CRM_07_PIPELINE_UPDATED.png



Final Outcome

Successfully converted a potential customer into an opportunity, then a customer, and created a quotation with complete CRM tracking.