Current Sales Stage

Report Module Guide: Current Sales Stage

Module Location

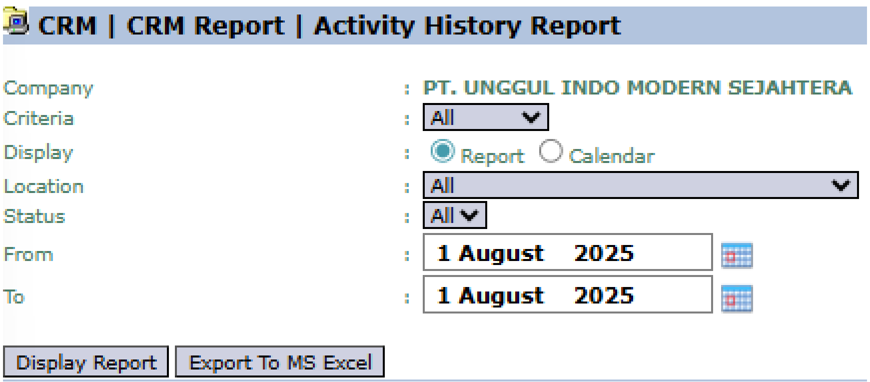
CRM > CRM Report > Current Sales Stage

Module Objective

The **Current Sales Stage** report module is used to generate a report that provides a current overview or snapshot of the sales pipeline. This report displays a list of all existing opportunities and shows which stage each of those opportunities is currently in. This is an important tool for sales forecasting and managing the overall health of the pipeline.

1. Report Parameters

The main page of this module is a form containing various parameters to customize the report that will be generated.



Here is an explanation for each parameter:

- **Account Officer**:

    - Use this dropdown to filter the report to show the pipeline for all salespeople (**-- All --**) or for a specific selected salesperson.

- **Opportunity**:
    - Use this field to search for and display data for one specific opportunity.

- **Status**:
    - Filter opportunities by their status, for example, to only display those that are still **"Open"**, **"Won"**, or **"Lost"**.

- **Change Date**:
    - Specify a **To** date range to see opportunities whose status changed within that period (e.g., up to August 31, 2025).

2. Steps to Generate the Report

Step 1: Set Report Parameters

Select all the parameters you need to focus the report. For example, select a specific **Account Officer** and the **"Open" Status** to see all active deals for that salesperson. Account Officer : -- All --
Status : -- None --

Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report**: To preview the report directly on your screen.


- **Export To MS Excel**: To download the report data in an Excel file format.


Tips & Important Notes

- This report is a primary tool for **Sales Managers** to get a quick overview of the entire ongoing sales pipeline.

- Use the **Status** filter and select **"Open"** to see all active deals that still have the potential to be won.

- The accuracy of this report is highly dependent on the **Sales team's discipline** in updating the **Sales Stage** in the Opportunity Module whenever there is progress.

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