Sales Stage

Module Guide: Sales Stage

Module Location

Settings > CRM > Sales Stage

Module Purpose

The **Sales Stage** module is used to define and standardize the steps or stages that make up the company's sales cycle (sales pipeline). The purpose is to create a structured framework (e.g., Prospecting, Qualification, Presentation, Negotiation, Won, Lost) that will be used by the CRM module to track and manage every sales opportunity.

1. Main View (Sales Stage List)

The main page displays all the sales stages that have been configured in the system.

View Explanation

- **Search Filter**:
  - **Sales Stage Code**: Allows for a quick search based on the unique code of a stage.
- **List Table**:
  - **Checkbox**: A checkbox to select one or more stages to be deleted.

    - **No.**: Serial number.
    - **Sales Stage Code**: The unique code for each stage.
    - **Sales Stage Name**: The descriptive name of the stage.
    - **Description**: A more detailed explanation of the activities or criteria at this stage.
    - **Order**: A number that determines the position of the stage in the sales process flow.
- **Action Buttons**:
    - **New Sales Stage**: Opens the form to create a new stage.
    - **Delete**: Deletes the selected stages.

2. Add Sales Stage Page

This form is used to add a new stage to the sales process flow.

View Explanation

- **Sales Stage Code**: A field to enter a unique code (required).
- **Sales Stage Name**: A field to enter the name of the stage (required).
- **Description**: An optional field to provide a more detailed explanation of the stage.

- **Order**: A dropdown selection to determine the order or position of this stage in the sales pipeline.

- **Buttons**:

  - **Save**: To save the new sales stage data.

  - **Cancel**: To cancel the process and return to the list page.

3. Steps to Add a New Sales Stage

1. From the main page, click the **New Sales Stage** button.

2. Fill in the **Sales Stage Code** and **Sales Stage Name**.

3. Add a **Description** if needed.

4. Select the appropriate **Order** to determine its position in the sales flow.

5. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Backbone of the CRM Sales Pipeline**: The data from this module is the backbone of the pipeline or sales funnel feature within the CRM module. Every sales opportunity will be marked as being in one of the stages defined here.

- **Sales Progress Tracking**: The sales team can update the status of their opportunities by moving them from one stage to the next, providing clear visibility into the progress of each deal.

- **Performance Reporting & Analysis**: Management can use this data to analyze the health of the pipeline, measure conversion rates between stages, forecast revenue, and identify bottlenecks in the sales process.

- **Process Standardization**: Ensures the entire sales team follows the same process and uses uniform terminology when managing sales opportunities.

5. Tips & Important Notes

- Define stages that truly reflect the actual sales process in your company. Avoid creating too many or too few stages.

- Use clear, action-oriented names, such as "Identify Needs," "Send Proposal," or "Follow-up."

- The **Order** field is very important as it determines the visualization of the sales funnel. Ensure the sequence is logical from the beginning to the end of the sales cycle.

- This module is a crucial initial configuration step before the sales team can begin using the CRM module effectively.

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