24ETAX ERP · PROCESS GUIDE 12

CRM – leads, deals and customers

Covers: CRM › CRM dashboard, Leads, Deals, Accounts, Contacts, Activities, CRM settings

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Purpose

Where sales work happens before an invoice exists: capture an enquiry as a lead, qualify it, convert it into a customer and a deal, move the deal through the pipeline, quote, and follow up. Accounts in CRM are the same customers the books use, so a salesperson sees what a customer owes next to what they might buy.

Who does what

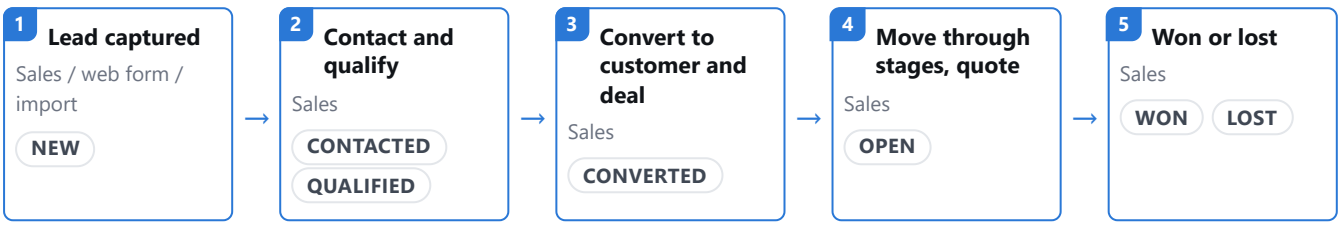
Role	What they do here
Sales	Leads, deals, activities, quotations and orders – only records they own. Cannot invoice or see the books.
Accountant, Admin	Everything, for every owner; can assign records to another person.
Approver, Auditor	Read-only view of all CRM records.
Admin	Pipelines, lost reasons, lead routing and web forms in CRM settings.

Before you start – setup (Admin)

1. Open **CRM** › **CRM settings**. Under **Pipelines** edit the default or click **+ New pipeline**: name each stage with its **Win probability %**; exactly one stage is of type Won and one Lost. **Save pipeline**.
2. Under **Lost reasons** keep the list of reasons salespeople may choose (price, competitor, no budget…).
3. Under **Lead routing** decide who gets leads that arrive without an owner – a fixed person or **Round-robin across the people below**.
4. Under **Web-to-lead forms** click **+ New web form**: **Form name**, **Lead source**, owner, **Thank-you message**; **Save form**. Copy the link or the embed snippet onto your website.

Process flow

LEAD TO WON DEAL



- A lost lead or lost deal needs a reason.
- When the customer accepts a quotation raised from the deal, the deal is marked won automatically.
- After a win, the order and invoice are handled in Sales (guide 04).

Steps

1. Capture a lead

1. Open **CRM** › **Leads**. Enter **Name ***, company, phone, e-mail, city, **Source** and the requirement under **Notes / requirement**. Entering a GSTIN fills state and PAN. Click **Create lead**.
2. If the lead looks like one already known (same GSTIN, PAN, e-mail or phone), **Possible duplicates** are shown. Open them before continuing.
3. Tick **Has agreed to receive WhatsApp messages** only if the person has agreed.
4. For many leads at once click **Import** and choose a CSV or Excel sheet. Every row is checked and shown with a **Verdict** before anything is saved.
5. Managers select leads and use **Assign** to give them to a salesperson.

2. Work the lead

1. Open the lead. Use **Call**, **WhatsApp** or **Email** and record what happened with **Log**; plan the next step with **Schedule** and a due time.
2. Set the status as it progresses: **New** → **Contacted** → **Qualified**.
3. A lead going nowhere: **Mark lost** and choose why.

3. Convert a qualified lead

1. On the lead click **Convert...**.
2. Choose: create a new customer (its ledger is created under Sundry Debtors), or attach to an existing **Customer** (only empty fields are filled; nothing the accounts team entered is overwritten).
3. Tick **Open a deal** and enter the **Deal title**, **Pipeline** and **Expected close**.
4. Click **Convert**. The person becomes a contact of the customer.

4. Manage deals

1. Open **CRM** › **Deals**. **Board view** shows a column per stage; **List view** shows a table. **Weighted forecast** is the open value multiplied by each stage's probability.
2. Drag a card to the next stage, or onto **Drop to win** / **Drop to lose**. On the deal page the same is done with **Move to stage**, **Mark won** and **Mark lost**.
3. Open a deal and add products or services as lines with **+ add line**; the deal value is their total before GST. Keep **Expected close** up to date. **Save deal**.
4. Click **Create quotation**. The quotation is prefilled from the lines (guide 04). The deal page then shows its quotation, order and invoice under **Quote → order → invoice**.
5. A deal that sits too long in a stage turns red on the board and appears under idle deals on the dashboard.
6. A deal closed by mistake: **Reopen**.

5. Activities

1. Open **CRM** › **Activities**. The lists are **Overdue**, **Today**, **Next 7 days** and **No due date**. Switch between **Mine** and **Team**.
2. Do the task, then mark it **Done** and type the **Outcome**.
3. You are reminded when each task is due, and each morning you get a summary of overdue tasks and idle deals.

6. Accounts and contacts

1. Open **CRM** › **Accounts** and a customer. The page shows **Outstanding**, **Overdue**, **Credit limit**, **Open pipeline**, **Lifetime invoiced** and **Last payment**, with **Receivable ageing**, deals, documents, contacts

and one combined **Timeline**.

2. Start new work from here with **+ Deal** or **+ Quotation**.
3. Before promising delivery to a customer with overdue amounts, speak to accounts.
4. **CRM** › **Contacts** lists every person across customers. Add one with **Add contact**; tick WhatsApp consent only when given.

7. Messages

- **WhatsApp** and **Email** send through the organisation's connected account and are logged on the timeline. WhatsApp is refused when there is "No WhatsApp consent on record".
- **Open in WhatsApp** and **Open in my mail app** use your own phone or mail program and log the message for you.

8. CRM dashboard

CRM › **CRM dashboard** shows **Pipeline by stage**, **Forecast by expected close**, lead conversion by source, lost reasons, **Idle deals**, **Activity this week** per person, **Win rate (90 days)** and **Won → invoiced** (won deal value against what was actually invoiced). Managers review it weekly with the team.

Checks and controls

CHECKS AND CONTROLS

- A salesperson sees only their own leads, deals, customers and quotations; this is enforced on the server, on the phone app too.
- No ledger is created for a prospect until the lead is converted, so the books contain only real customers.
- WhatsApp is blocked without recorded consent. Every message sent is logged with its delivery status.
- Every stage move is recorded with date and person under **Stage history**.

Limits

LIMITS

- Replies from customers are not pulled into the system; log them by hand.
- WhatsApp through the organisation's account works in test mode until the administrator connects a live messaging provider.
- A stage that still holds deals cannot be removed from a pipeline.

Routine checklist

Daily (salesperson)

- [ ] Overdue and today's activities done and marked with an outcome.
- [ ] New leads contacted the same day; status updated.

Weekly (manager)

- [ ] Unassigned leads assigned. Idle deals discussed. Expected close dates in the past corrected.
- [ ] Lost deals of the week have a reason. Won deals have an order or invoice.