9 Sales: from the potentials to invoice

The main modules and processes involved in the pre-sales, sales and after-sales phases are:

- Leads
- Potentials
- Quotes
- Sales and Purchase Orders
- Invoices
- HelpDesk and FAQs

What are normally defined as marketing lists (from websites, word-of-mouth, fairs or various suppliers) are managed with the Leads module. As explained in the first part of this manual, the sales person who manages the lead will convert it into a customer (company and/or contact) only after the expression of real interest.

With this method, it is possible to keep a clear distinction between activities for potential customers and those for customers that have already acquired or are under negotiation. All commercial activities proper are therefore carried out on Accounts and/or Contacts. You will find many connection possibilities from the company/contact reports menu as all CRM revolves around the customer.

Let us now look at the business and administrative processes in detail: Potential, Quote, Sales Order, Invoice.

Revision #1
Created 2026-01-28 14:56:19 UTC by Admin
Updated 2026-01-28 14:56:19 UTC by Admin