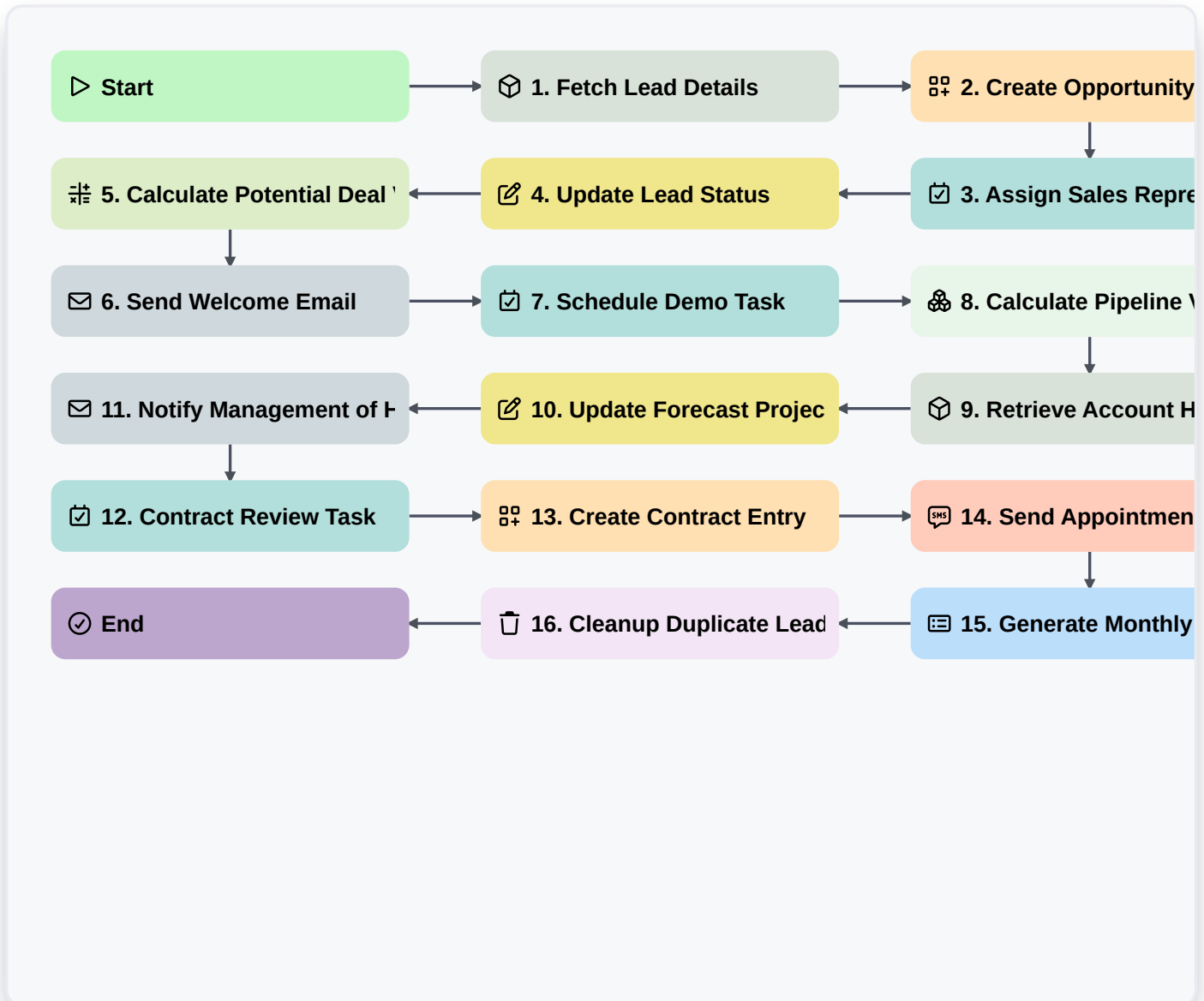


# Customer Relationship Management (CRM) Workflow



## ▶ Start

Start of the Workflow/Process.

## 📦 1. Fetch Lead Details

Retrieve existing contact information and company details from the Leads data model.

## 📄 2. Create Opportunity

Generate a new entry in the Opportunities data model once a lead is qualified.

## 📅 3. Assign Sales Representative

Create a task for the assigned Account Manager to initiate the discovery call.

## ✍️ 4. Update Lead Status

Change the status of the Lead entry from 'New' to 'In Progress' or 'Qualified'.

## 🔢 5. Calculate Potential Deal Value

Execute a formula to calculate total value based on product quantity and unit price.



✉ **6. Send Welcome Email**

Send an automated introductory email to the lead contact.

📅 **7. Schedule Demo Task**

Create a follow-up task for the sales rep to conduct a product demonstration.

🧮 **8. Calculate Pipeline Value**

Sum the total value of all 'Open' opportunities in the current quarter.

📦 **9. Retrieve Account History**

Fetch all previous interactions and closed deals associated with the parent Account.

✍️ **10. Update Forecast Projection**

Update the revenue forecast field in the Sales Dashboard data model.

✉ **11. Notify Management of High-Value Deal**

Send an email alert to the Sales Director when an opportunity exceeds a specific threshold.

📅 **12. Contract Review Task**

Create a task for the Legal team to review the terms of the negotiated agreement.

📄 **13. Create Contract Entry**

Generate a new contract record in the Contracts data model linked to the Opportunity.

📱 **14. Send Appointment Reminder**

Send an SMS reminder to the client 24 hours before the scheduled demo.

📊 **15. Generate Monthly Conversion Report**

Create a performance report showing the conversion rate from Lead to Opportunity.

🗑️ **16. Cleanup Duplicate Leads**

Remove identified duplicate entries from the Leads data model to maintain data integrity.

✅ **End**

End of the Workflow/Process.