

Guide for the sales representative

Guides by job role

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Guides by job role

Guide for the sales representative

Manage leads, quote, follow up and turn orders into invoices.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Your role

You find customers, give accurate quotes, follow up and turn interest into paid orders.

Every day

1. Open your **To Do** and the leads assigned to you. See To Do, assignments and mentions.
2. Log every new enquiry as a **Lead**, with the source. See Leads and opportunities.
3. Send **quotations** to interested customers, from the lead or opportunity. See From quotation to invoice.
4. Follow up open quotations. Write each call or visit in the record's comments.
5. When a customer accepts, create the **Sales Order** from the quotation.

For existing customers

- Check their balance and history before you promise credit. See Creating and managing customers.
- Check **stock** before promising delivery. See Stock reports.
- Ask the accountant before giving a discount outside your limit.

Every week

- Update your opportunities' stages and expected dates. See Sales pipeline and CRM reports.
- Record why you lost any deal.
- Book appointments. See Campaigns and appointments.

Common mistakes

- Quoting from memory, without checking the price list and stock.
- Leaving leads with no next step or date.
- Promising a delivery date to the customer without asking the store.

Who to ask

Your sales manager for discounts, the storekeeper for stock, and the accountant for credit terms.

Related documentation

- Leads and opportunities
- From quotation to payment
- Creating and managing customers
- Sales pipeline and CRM reports