Tracking prospects in ERPNext CRM

> Since 5 November 2026, NFE tracks prospective customers in **ERPNext's CRM**, not in the Library's Potential Customers table. This page explains how we record a prospect, which sales stage and probability to use, and how to keep the pipeline current. Owner: Aaron Tushabe.

Where to look

- **The pipeline:** Opportunities, one per deal, with its stage, probability and owner.
- **Organisations:** Prospects. **People:** Leads.
- **Reports:** Sales Pipeline Analytics and Opportunity Summary by Sales Stage. Both count Opportunities only, which is why every prospect gets one.

Access: Aaron, Dansturn and Hillary have Sales User and Sales Manager (granted 5 November 2026; see the ERPNext access review addendum). Anyone else who needs the CRM asks Aaron.

How we record a prospect

ERPNext record	What it holds	Example
Prospect	The organisation or site. One per prospective customer	Example Heights Apartments
Lead	A named person there, added to the Prospect's *Leads* table	Jane Example (Property Manager)
Contact	Made automatically from each Lead	Jane Example
Opportunity	The deal, raised from the Prospect	CRM-OPP-2026-NNNNN

Adding a new prospect

1. **Prospect.** Give the organisation name, **Customer Group** (Commercial; Non Profit for churches and NGOs; Government), **Territory** Uganda, **Industry** (Real Estate for housing), and **Prospect Owner**, the NFE person leading it. On the Notes tab, add the size (apartments, households or MWh/month), how we met them, and a link to any Library page.
2. **Leads.** Make a Lead for each named person (first and last name, organisation, job title, Lead Owner), then add it to the Prospect's *Leads* table. Skip this step until you have a name.
3. **Opportunity.** On the Prospect, use **Create → Opportunity**. Set **Opportunity Type** Sales, the **Sales Stage** and **Probability** from the table below, the **Opportunity Owner**, and the **Contact Person** if there is one. Add the amount and expected closing date once you know them.

Always set Probability. A new Opportunity starts at 100%, which inflates the pipeline.

Claude can do all three steps with the erpnext-api skill, using your own key, so you show as the owner (see Using ERPNext with Claude). Don't create CRM records through mcphub, which records them as Administrator's.

Sales stages and probabilities

Where the deal is	Sales Stage	Probability
We know of the site but haven't reached anyone yet	Prospecting	10%
In conversation with a named contact; screening the site (for Commercial RPMs, see Assessing a Commercial RPM lead)	Qualification	20%
Proposal sent	Proposal/Price Quote	40%
Negotiating terms	Negotiation/Review	60%

We don't use ERPNext's other stages (Needs Analysis, Value Proposition, Identifying Decision Makers, Perception Analysis).

Keeping it current

- **After every meeting, call or email that moves a deal:** add a note on the Opportunity's Notes tab, and update its Sales Stage and Probability.
- **Leave Status at Open** while a deal is live. ERPNext closes Opportunities left at *Replied* for 15 days (CRM Settings).

- **Lost:** set Status to **Lost**. ERPNext asks for a reason, and the list starts empty, so add one if none fits (for example "Chose a competitor").
- **Paused:** use **Close** on the Opportunity, and **Reopen** when talks restart.
- **Won:** tell Aaron. We haven't yet decided how a won deal becomes an ERPNext Customer, since NFE's customers aren't in ERPNext yet.
- Keep the long-form story (site details, economics, history) on the customer's Library page, as for Worship Harvest, and link it from the Prospect's notes.

Not in the CRM

- **Sezibwa Homes** is an operating customer, not a prospect.
- **Arkright Estates** was left out when the list moved to ERPNext on 5 November 2026.

Last reviewed 5 November 2026 by Aaron Tushabe.

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