

CRM/Sales

The Opportunity and Dashboard buttons are governed by a particular User Right. Not all Chase users are able to see these buttons on the Main Menu however they can be seen by users who have the **L** code in their user right. For more details on how to assign user rights please follow this link [How to assign rights to a user](#).

Opportunity window:

The opportunity enters CRM as stage Lead, and the opportunity passes through a series of qualifying stages such as **Prospect**, **Proposal**, and finally being won or lost.

The Sales Rep and Sales Manager Opportunity window views have different buttons/columns.

The **Sales Rep** will only be able to add an opportunity and view all opportunities created by him/her. On the Sales Rep window, there are buttons that you will not see and only Sales Managers will be able to see them. This is governed by the **Is Sales Manager** checkbox on the User Details window. For more details about the **Is Sales Manager**, checkbox click on this link [Users](#).

O P P O R T U N I T I E S

+ [] []

Status Filter: Show All Open

| Company | Description | Contact | Contact Phone | Date Added | Target Date | Opp St | Probab | Sale Vi | Assign | Client I | FY Est | FY Ann | Industr | Last Ac | Last Action Date | Due Date |
|--------------------|-------------|-------------|---------------|-------------|-------------|--------|--------|---------|--------|----------|--------|--------|---------|---------|------------------|-------------|
| samsung | TV ad | Rose | 0123698522 | 05 Dec 2016 | 15 Dec 2016 | Pro... | 60% | 6000 | Kim | | 0 | 0 | | | | |
| | Radio Add | Maseke | 0113698521 | 06 Jan 2017 | 20 Jan 2017 | Pro... | 60% | 6000 | Kim | | 0 | 0 | | | | |
| KC collection | | Maria | 0116932581 | 06 Jan 2017 | 26 Jan 2017 | Pro... | 60% | 3000 | Kim | | 0 | 0 | | | | |
| Capital | | Will | 0823698528 | 06 Jan 2017 | 13 Jan 2017 | Pro... | 60% | 2000 | Kim | | 0 | 0 | | | | |
| Loreal | | Jane | 0123698557 | 13 Feb 2017 | 18 May 2017 | Pro... | 50% | 1000 | Kim | | 0 | 0 | | | | |
| Absa | | Linda | 0124569874 | 13 Feb 2017 | 16 Mar 2017 | Pro... | 30% | 500 | Kim | | 0 | 0 | | | | |
| Telkom Mobile | Billboards | M Simpson | 0837584562 | 25 Feb 2020 | 25 May 2020 | Pro... | 1% | 450... | Kim | Telk... | 540... | 540... | Tele... | T... | 25 Feb 2020 | |
| Insika Productions | Billboards | Mark Hearld | 0164512222 | 26 Nov 2020 | 20 Jan 2021 | Pro... | 50% | 500... | Kim | 300... | 500... | Pha... | T... | | 26 Nov 2020 | 16 Dec 2020 |

Notes:

The **Sales Manager** will be able to see all opportunities created by Sales Rep, **Filter per user**, **Assign Opportunities**, and **Auto Assign**. The differences are with the Sales Rep window you only see opportunities created by you.

O P P O R T U N I T I E S

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Adam Assign Opportunity Auto Assign

Status Filter: Show All Open

| Company | Description | Contact | Contact Phone | Date Added | Target Date | Opp St | Probab | Sale Vi | Assign | Client I | FY Est | FY Annualise | Industry | Last Action | Last Action Date | Due Date |
|-------------------|-------------------|------------|---------------|-------------|-------------|--------|--------|---------|--------|----------|--------|--------------|----------------|--------------|------------------|-----------|
| Media Digital | Print Producti... | J Markson | 0825562356 | 04 Apr 2017 | 12 Apr 2017 | Pro... | 59% | 250... | Ada... | | 0 | 0 | | | | 30 May 2 |
| Insika Production | TV and Radio | M Man | 0168553261 | 04 Apr 2017 | 06 Apr 2017 | Pro... | 0% | 840... | Una... | | 0 | 0 | | | | |
| TCC | TV and Radio | Mpho Si... | 0125226359 | 19 Apr 2017 | 20 Apr 2017 | Pro... | 60% | 850 | Ada... | TC... | 250... | 560 | Pharmaceuti... | Second B... | 19 Apr 2017 | 26 Apr 20 |
| Telkom Mobile | Billboards | M Simps... | 083 758 4562 | 29 May 2017 | 23 Jun 2017 | Pro... | 1% | 450... | Ada... | Telk... | 540... | 540000 | Telecommuni... | Client ha... | 02 Mar 2020 | 17 Mar 20 |

Add Opportunity

Company:

Description:

Contact:

Contact Number:

Date Added: 26 Nov 2020

Target Date:

Status:

Probability:

Cost Price:

Sale Value:

Assigned To: Adam

Client Parent Company:

FY Est Revenue:

FY Annualised Revenue:

Industry:

Last Action:

Last Action Date:

Upload file(s)

Notes:

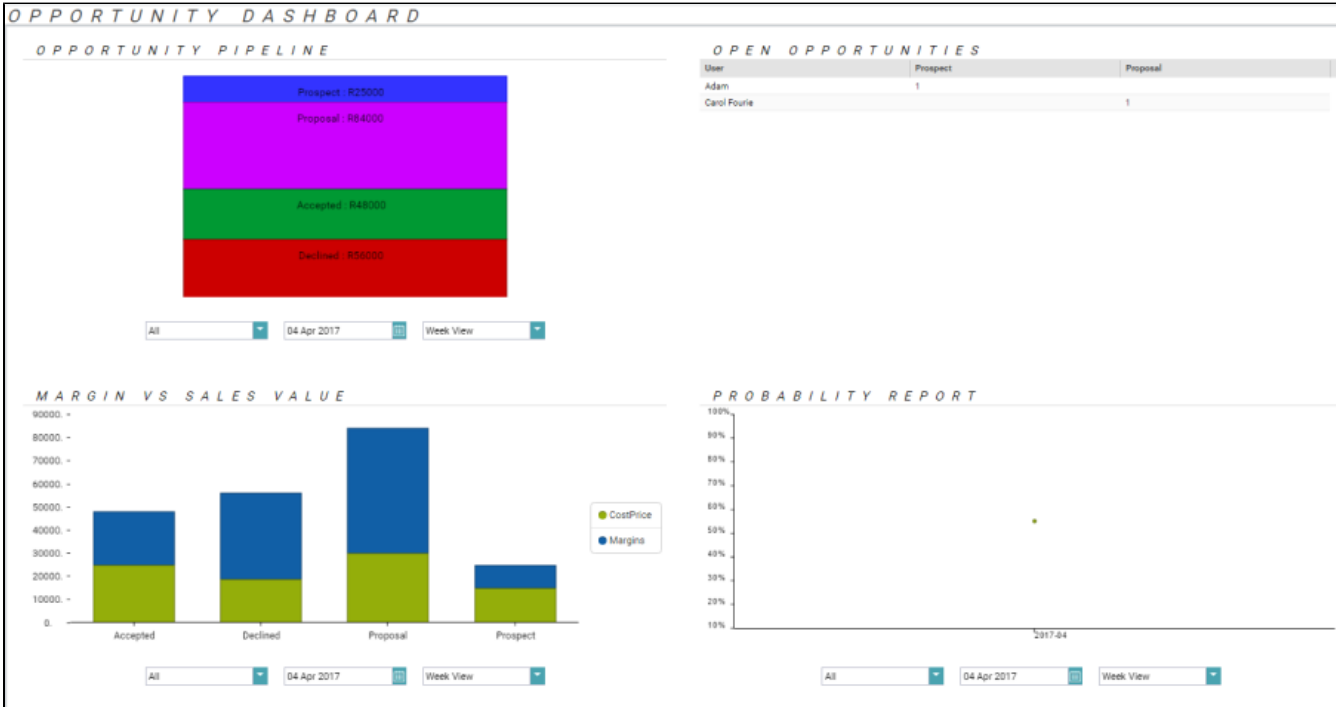
Company name

| Fields | Description |
|----------------|--|
| Company | Company name of new client. |
| Description | This is the name the User chooses for an opportunity. |
| Contact | Enter the name of the contact person at that company. |
| Contact Number | The primary external contact's number for the opportunity. |
| Date Added | The date when the lead was added. |

| | |
|-----------------------|---|
| Target Date | The target closing date. |
| Status | The current status of the opportunity as per the set status names. User can configure these names in the Look Up code section. <ul style="list-style-type: none"> • Prospect • Proposal • Accepted • Declined • The default for Status is set as Prospect |
| Probability | The likelihood of closing the opportunity, and having it become a job bag. |
| Cost Price | The cost to company of the sale. |
| Sale Value | Estimated monetary amount of the opportunity. |
| Assigned To | User who created the opportunity and is assigned to it. |
| Client Parent Company | The holding company for the new client. |
| FY Est Revenue | Estimated rand revenue if won in the current fiscal (full year). |
| FY Annualised Revenue | Full year annualised rand revenue (a 12-month figure, ignoring fiscal). This column must be equal to or greater than Full Years Estimated Revenue. |
| Industry | Prospective client industry. |
| Last Action | Enter notes about the status of the latest activity on the opportunity. |
| Last Action date | The latest activity date. This field will populate with the last date that the user added notes in the Last Action field. Users will be able to change the Last Action Date however they cannot add the Last Action Date before adding the Last Action. |
| Due Date | The next activity on the opportunity set as a Reminder date on the opportunity. |
| Upload File(s) button | Allows you to upload external documents. |
| Notes | Add additional notes about the opportunity in this section. |

Dashboard window:

Dashboard allows you to get a big-picture perspective, or drill down to a very detailed view, by easily creating and personalising the dashboard to display the metrics most relevant to you, your staff and any other relevant personnel given permission.



| Sections | Description |
|-----------------------|--|
| Opportunity Pipeline | <p>The pipeline displays only the User's opportunities for the current week, consisting of four statuses of the opportunity in the diagram, those being</p> <ul style="list-style-type: none"> • Prospect • Proposal • Accepted • Declined |
| Open Opportunity | <p>The view is in a table format and contains the following information:</p> <ul style="list-style-type: none"> • Open Opportunities <ul style="list-style-type: none"> • Prospect • Proposal • Number of open Opportunities per status <p>The default setting is All users, which displays the users in the Sales team. Doing this keeps them competitive.</p> |
| Margin Vs Sales Value | <p>The bar chart contains the following data, which is pulled from the Opportunity table:</p> <ul style="list-style-type: none"> • Total Margin and Sale Value of Prospect for the time selected. • Total Margin and Sale Value of Proposals for the time selected. • Total Margin and Sale Value of Accepted for the time selected. • Total Margin and Sale Value of Declined Proposal for the time selected. |
| Probability Report | <p>The Probability Report graph will display a comparison of the captured Probability percentage value against the selected Month. The percentage counting from 10% and incrementing by 15 throughout up to 100%.</p> |