CRM/Sales

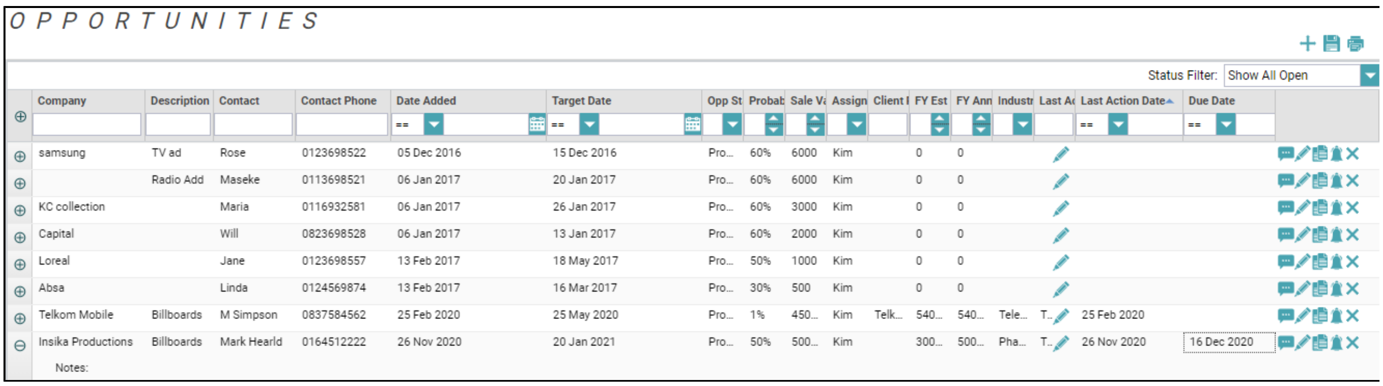
The Opportunity and Dashboard buttons are governed by a particular User Right. Not all Chase users are able to see these buttons on the Main Manu however they can be seen by users who have the **L** code in their user right. For more details on how to assign user rights please follow this link How to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

Opportunity window:

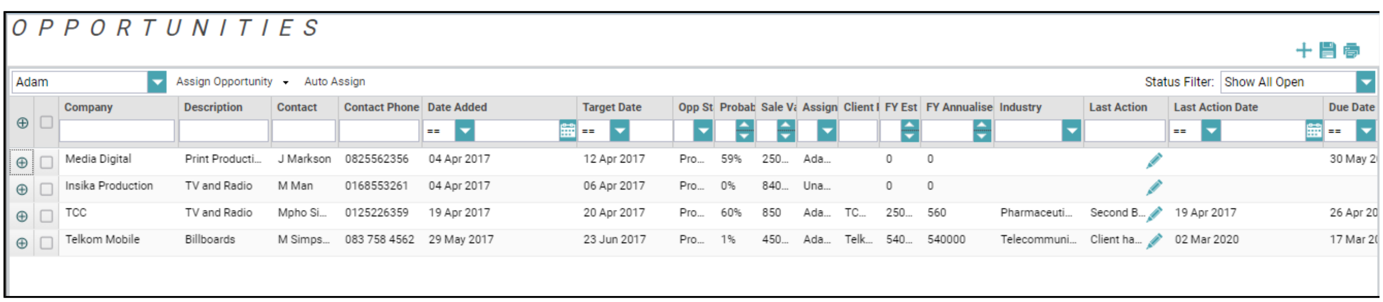
The opportunity enters CRM as stage Lead, and the opportunity passes through a series of qualifying stages such as **Prospect**, **Proposal**, and finally being won or lost.

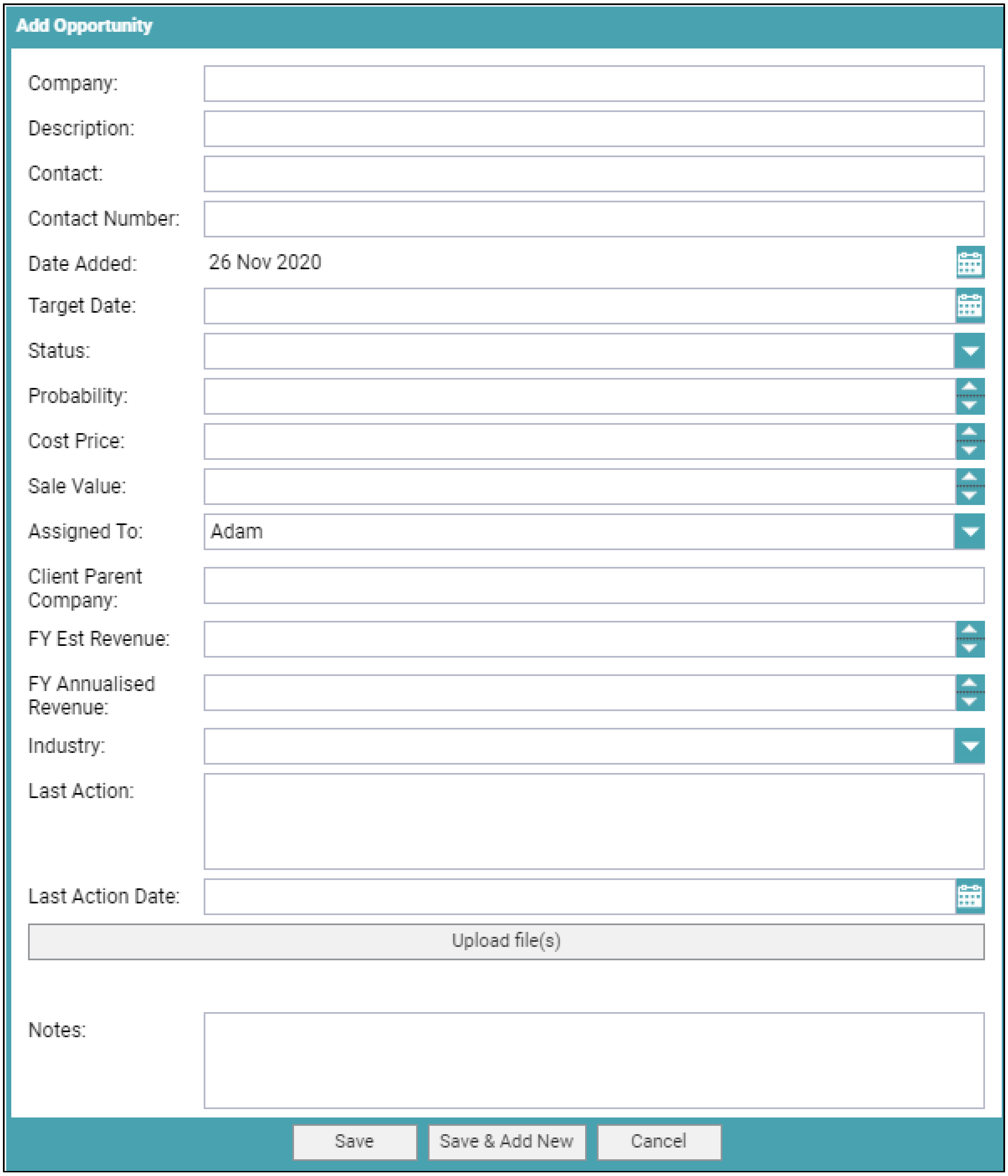
The Sales Rep and Sales Manager Opportunity window views have different buttons/columns.

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.



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.





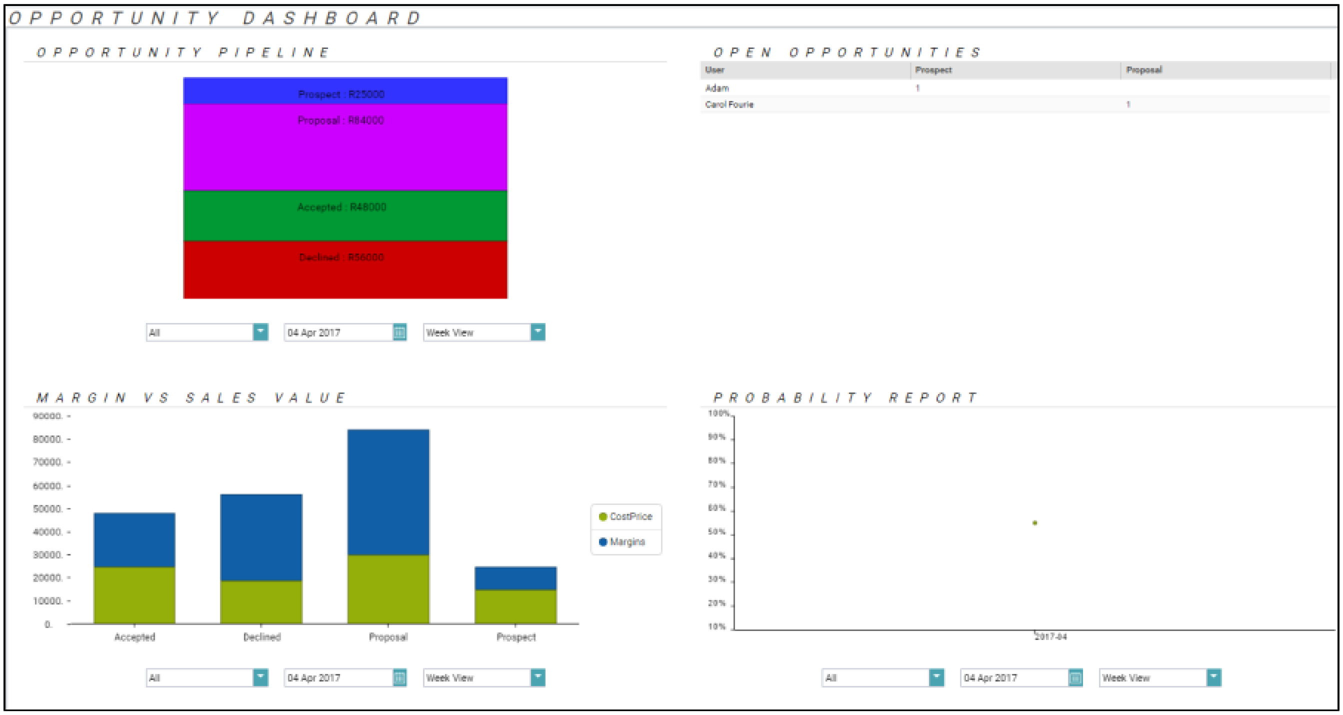
Company name

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. • 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	The pipeline displays only the User's opportunities for the current week, consisting of four statuses of the opportunity in the diagram, those being • Prospect • Proposal • Accepted • Declined

Open Opportunity	The view is in a table format and contains the following information:
	• Open Opportunities
	  • Prospect
	  • Proposal
	• Number of open Opportunities per status
	
	The default setting is All users, which displays the users in the Sales team. Doing this keeps them competitive.

Margin Vs Sales Value	The bar chart contains the following data, which is pulled from the Opportunity table: • 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	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%.