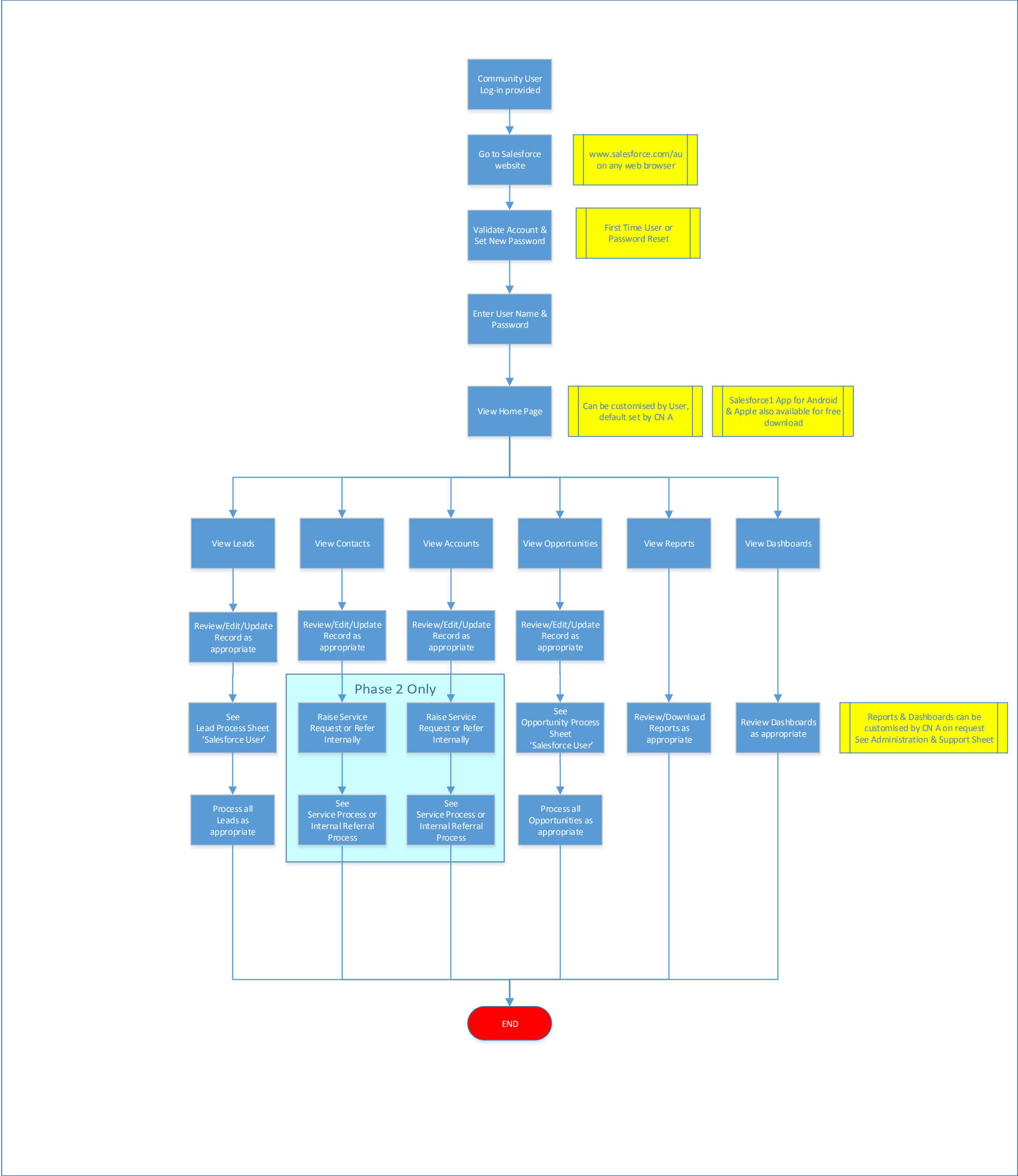




JVP Community User – Log-in and General Interaction Overview



# Chan & Naylor Salesforce – JVP Community Process Flows (Lead Processing)

Phase



[Opportunity Process](#)



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Coming Soon

[Service Process](#)



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Coming Soon

[Internal Referral Process](#)



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Coming Soon



## Administration & Support



Salesforce.com Implementation Objectives	
<b>Objective 1</b>	Capture Leads and assign to relevant JVP. Provide effective tool to track prospect status and progress after assigning to JVP
<b>Objective 2</b>	Provide access for JVPs to leads for them to be able to qualify the Lead, nurture the Lead and track the Sales Process till the Customer has signed the engagement letter and/or availed themselves of a product and/or service
<b>Objective 3</b>	Provide a central database to enable CNA to effectively run their marketing functions
<b>Objective 4</b>	Provide ability for CNA to collaborate with the JVP for making the Sales process quicker and more efficient (via reminders, chatter etc.)
<b>Objective 5</b>	Track JVP on-boarding Process

### Lead Fields Captured

FIELD	TYPE
First Name	Text
Last Name	Text
How can we help you?	Text
Email	Text
Best Contact Number	Phone
Post Code	Text
Are you an existing Client of Chan & Naylor?	Radio button
Which Chan & Naylor office would be most convenient to your needs?	Picklist
Your preferred method of contact?	Radio button
Tell me more about a Financial Strategic Consultation at \$395. (incl. GST)	Radio button
I'd like to be contacted by a(n): Tax Returns, Trust/Structures (for Wealth Creation & Asset Protection), Tax Planning, Audit, Business Improvement, Virtual CFO, Succession Planning, Investment Loans, Re-Financing, Portfolio Review, Superannuation/SMSF, Investment Advice, Insurance	Checkboxes
How did you hear about Chan & Naylor?	Picklist
Would you like to be included in our email list for monthly newsletters, important updates and free special event offers?	Radio button

### Reports Available

Sr. No	Report Description
1.	Sales Conversion Rate - lead to client
2.	Lead Close Rate (including both success and fail)
3.	Standard Opportunity Pipeline Report
4.	Lead by source
5.	Opportunity by State, by JVP, by revenue
6.	Quarterly and annual report for alliance partner on services/products purchased
7.	Subscription Status Report
8.	Customers who have requested Tax Returns


### Security Permissions \* JVP's only have access to their own records

Object Permissions	CNA	JVP
<b>Leads</b>		
Read	Y	Y
Create	Y	Y
Edit	Y	Y
Delete	Y	Y
<b>Account</b>		
Read	Y	Y
Create	Y	Y
Edit	Y	Y
Delete	Y	Y
<b>Contact</b>		
Read	Y	Y
Create	Y	Y
Edit	Y	Y
Delete	Y	Y
<b>Opportunity</b>		
Read	Y	Y
Create	Y	Y
Edit	Y	Y
Delete	Y	Y
<b>Service Details</b>		
Read	Y	Y
Create	Y	Y
Edit	Y	Y
Delete	Y	Y

### Monitored Fields for PM synchronisation

No.	Type	Field Name	Action
1	Contact Detail	Contact Owner	Email Client Manager for PM update
2	Contact Detail	Name	Email Client Manager for PM update
3	Contact Detail	Casual Name	Email Client Manager for PM update
4	Contact Detail	Job Title	Email Client Manager for PM update
5	Contact Detail	TFN	Email Client Manager for PM update
6	Contact Detail	DOB	Email Client Manager for PM update
7	Contact Detail	Date Deceased	Email Client Manager for PM update
8	Contact Detail	NLC Date	Email Client Manager for PM update
9	Contact Detail	Account Name	Email Client Manager for PM update
10	Contact Detail	Client ID	Email Client Manager for PM update
11	Contact Detail	Group ID	Email Client Manager for PM update
12	Contact Detail	CN Home Office	Email Client Manager for PM update
13	Contact Detail	CN Partner	Email Client Manager for PM update
14	Contact Detail	CN Client Manager	Email Client Manager for PM update
15	Contact Detail	CN Staff	Email Client Manager for PM update
16	Contact Detail	Phone	Email Client Manager for PM update
17	Contact Detail	Mobile	Email Client Manager for PM update
18	Contact Detail	Fax	Email Client Manager for PM update
19	Contact Detail	Home Phone	Email Client Manager for PM update
20	Contact Detail	Email	Email Client Manager for PM update
21	Contact Detail	Mailing Address	Email Client Manager for PM update
22	Contact Detail	Newsletter Subscription	Email Client Manager for PM update
23	Account Detail	Account Owner	Email Client Manager for PM update
24	Account Detail	Account Name	Email Client Manager for PM update
25	Account Detail	ABN	Email Client Manager for PM update
26	Account Detail	ACN	Email Client Manager for PM update
27	Account Detail	SFN	Email Client Manager for PM update
28	Account Detail	Phone	Email Client Manager for PM update
29	Account Detail	Email	Email Client Manager for PM update
30	Account Detail	Billing Address	Email Client Manager for PM update

### Workflow & Automation Rules

Workflow/Automation	Object	Description
Web-to-Lead	Lead	Capture Web to Lead from CNA website  (Contact: <a href="http://www.chan-naylor.com.au/contact/">http://www.chan-naylor.com.au/contact/</a>  Audit: <a href="http://www.chan-naylor.com.au/audit-services/">http://www.chan-naylor.com.au/audit-services/</a>  BA: <a href="http://www.chan-naylor.com.au/cnba/#sendusmessage">http://www.chan-naylor.com.au/cnba/#sendusmessage</a> )
Ability for the CNA staff to create a lead from an internal web to lead form which will include the Capture method field	Lead	
Lead Assignment Rules	Lead	As per "Lead Assignment Rule V0.2- From Greg" document   noname (1).eml
Ability to notify JVP on lead Assignment	Lead	
Email Notification to JVP and CNA User if Lead is not actioned in 3 days of assignment	Lead	
Email Notification to JVP and CNA User if Lead is not actioned in 5 days of assignment	Lead	
Lead Rating	Lead	As per rules provided by CNA. For Details please check 'Rules Details' section
Ability to trigger task reminder for JVP to send ethical letter to client's previous accountant once engagement letter is signed	Opportunity	
Ability to for JVP to capture future follow up date and trigger task reminder when the customer is Qualified but is on Hold (Status = Qualified - On hold)	Opportunity	
Ability to notify the JVP or CNA whenever the ownership of the lead or Opportunity is transferred	Lead/Opportunity	
Ability to create opportunity directly if current client submits a request for new service via web to lead and	Opportunity	