

Sales pipeline and CRM reports

Selling and customers

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See where each opportunity stands, forecast sales and find out why you win or lose.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

Your **sales pipeline** is the list of all opportunities and how far each has progressed. Hesabu ERP shows it as a funnel, a board and reports, so you can see what is likely to close.

Prerequisites

Leads and opportunities entered with a **Sales Stage** and an expected amount. See Leads and opportunities.

Steps

Use the pipeline

1. Open the **Opportunity** list and switch to **Kanban** or **Pipeline** view.
2. Drag an opportunity between columns as it moves, for example from *Prospecting* to *Proposal*.
3. Update the **Expected Closing Date** and **Opportunity Amount**.

Record a lost opportunity

1. Open the opportunity, click **Set as Lost**, and choose the **Lost Reason**, such as *Price* or *Went to a competitor*.
2. Add **Lost Reason** values under **Opportunity Lost Reason** so they are consistent.

Reports

Search for these in the search bar.

Report	Shows
Sales Funnel	Leads, opportunities, quotations and orders by stage
Lead Details and **Lead Conversion Time**	Who has not been followed up, how long they take to become customers
Opportunity Summary by Sales Stage	Value in each stage
Lost Opportunity	Why you lose sales
Sales Pipeline Analytics	Pipeline by person, territory or period
Prospects Engaged But Not Converted	Leads that need a push

Practical example

On Monday the sales manager opens the funnel and sees KES 4.2 million in *Proposal*. The lost report shows three losses to price, so she reviews the discount rules and asks reps to follow up the three oldest proposals.

Important notes

- A pipeline is only useful if people keep it up to date. Review it weekly.
- Do not count unlikely deals at full value when forecasting.

Common mistakes

- Leaving old opportunities open for months.
- Missing lost reasons, so you learn nothing.

Next steps

Return to Leads and opportunities.

Related documentation

- Leads and opportunities
- Campaigns and appointments
- From quotation to payment