



pipeliner
the unique selling power

www.pipelinersales.com

powered by  **up
time**
ITechnologies

p-free

quick guide

Version 3.0

pipeliner quick guide

p – free

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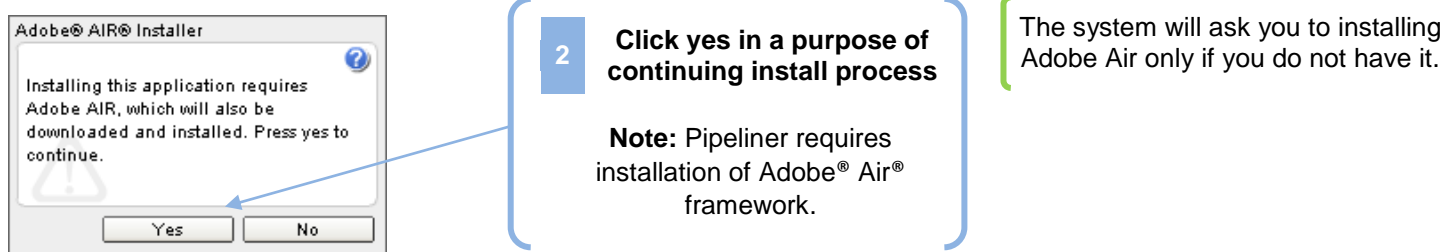
Adobe® AIR® is either registered trademark or trademark of Adobe Systems Incorporated in the United States and/or other countries.

Quick pipeliner install

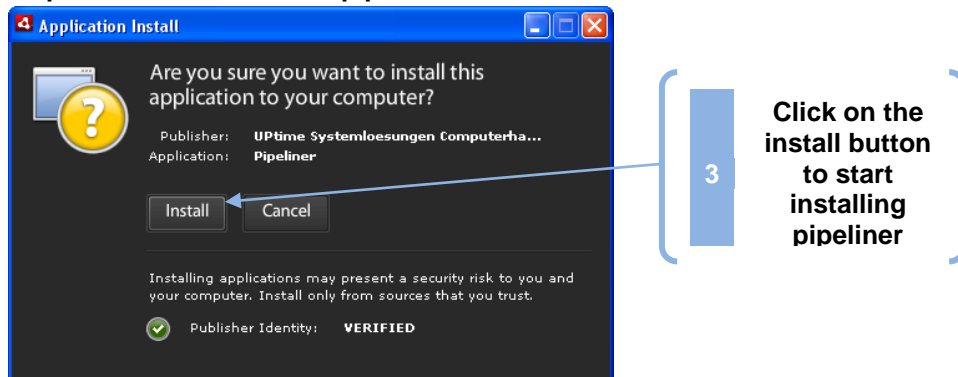
1. Step – Select the pipeliner language and start installation



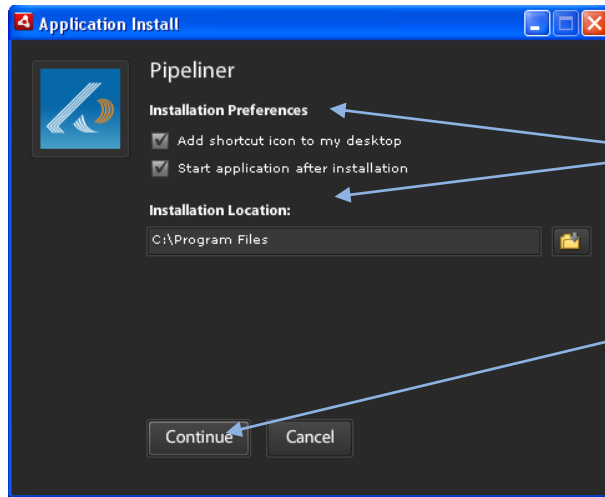
2. Step – Submit Adobe AIR installation



3. Step – Start installation of pipeliner

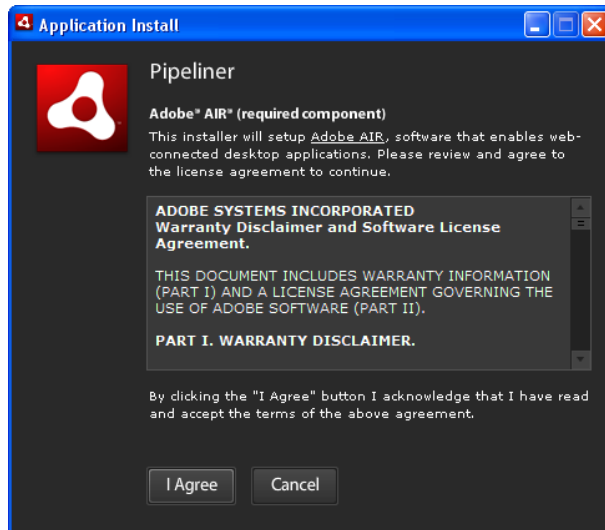


4. Step - Setting up pipeliner installation preferences and location



- 4 Customize your installation preferences and location
- 5 Click continue to proceed

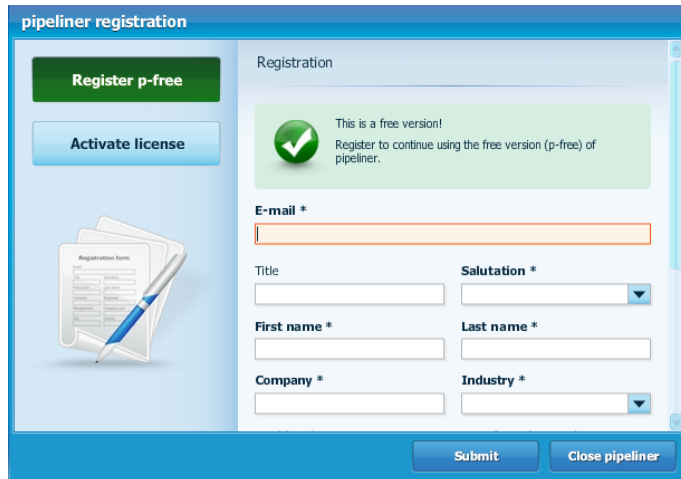
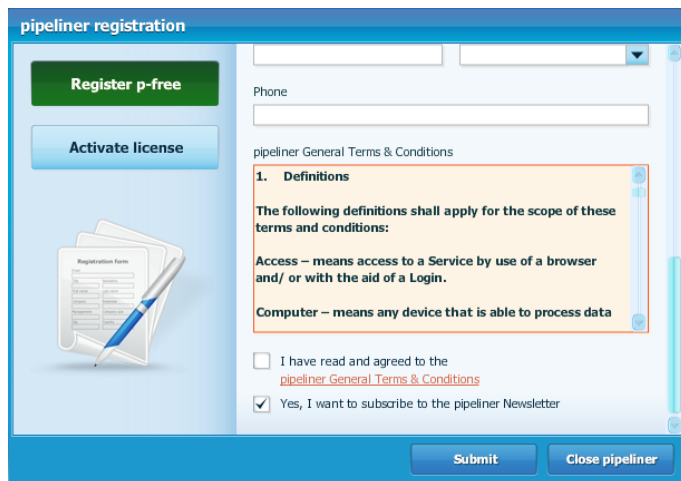
5. Step - Adobe license



- 6 Read End User License condition of Adobe® Air® and continue with installation and wait until the system will install pipeliner.

Registration form

After successful installation and opening pipeliner, the system will ask you to fill in the registration form, which is needed to be filled in order to use the pipeliner p-free version.

5

Insert all mandatory fields marked with „*“. Please read the GTAC and click on the „submit“ button to start using pipeliner.

Now, you can use and experience unique sales force empowerment software, pipeliner.

Using pipeliner – graphic user interface (GUI)

Pipeliner has three main features, which help you to see your business competence according to your desired target. Firstly, there is target, which, inter alia, shows you the actual status of your business efficiency. Secondly, pipeliner setup, where you can configure e.g. number of sales steps with the purpose of seeing the development of your business according to your opportunities. Finally, pipeliner consists of the opportunities, which are part of your business strategy.




Quick guide – Free version

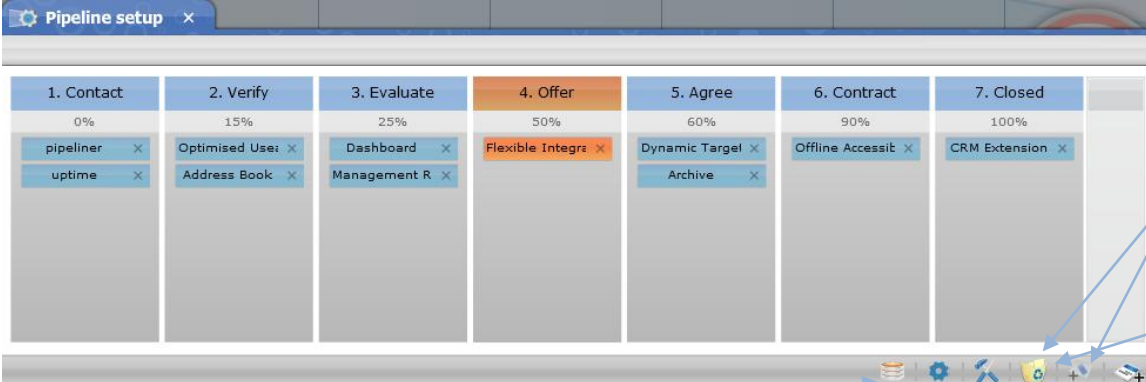
Step 1 Setup pipeline

At the beginning, you have to configure your pipeline setup. Pipeline consists of sales steps, its percentage of probability and documents templates. Setting up the configuration of all these features will help you to follow your business sales strategy.

How to
get there



Pipeliner menu > Pipeliner menu > Pipeline setup



1. Contact	2. Verify	3. Evaluate	4. Offer	5. Agree	6. Contract	7. Closed
0%	15%	25%	50%	60%	90%	100%
pipeliner uptime	Optimised Use: Address Book	Dashboard Management R	Flexible Integr Dynamic Target	Dynamic Target Archive	Offline Accessit CRM Extension	CRM Extension

1 Add/remove sales step

2 Add/remove document template

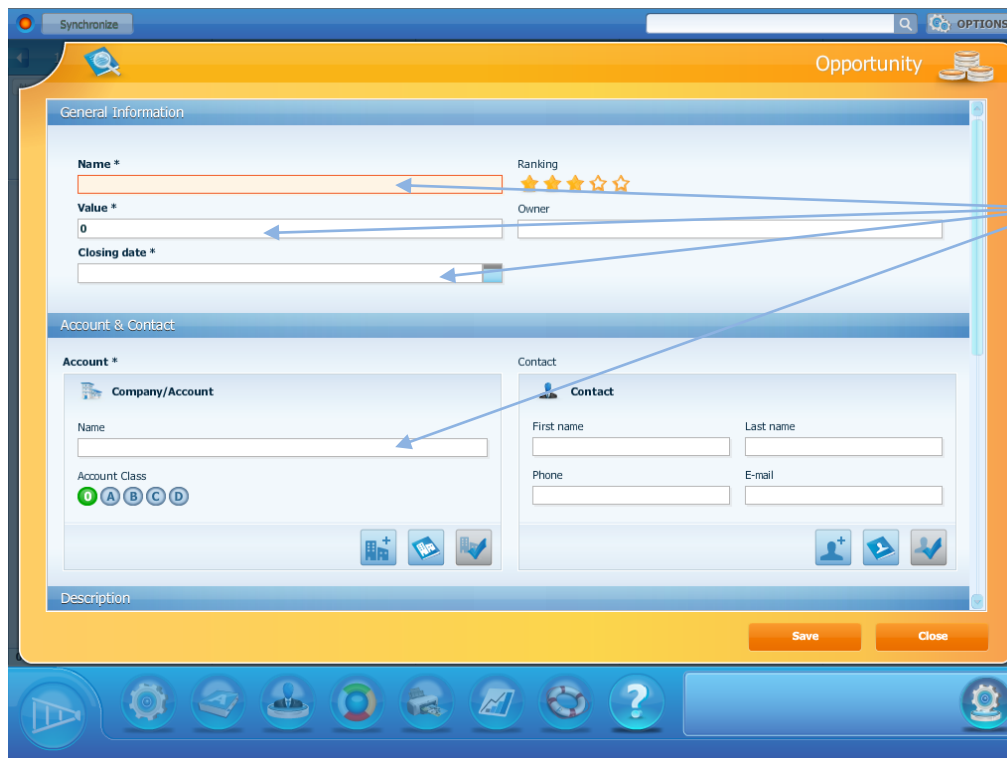
3 Edit name of sales step, document

4 Edit document template

5 Edit currency symbol

Step 2 Feed pipeline (Add opportunities)

Every sales strategy is related to the opportunities in its business. The main advantage of pipeliner is its ability to contain as many opportunities as your business needs. You have to “feed” your pipeline with opportunities.

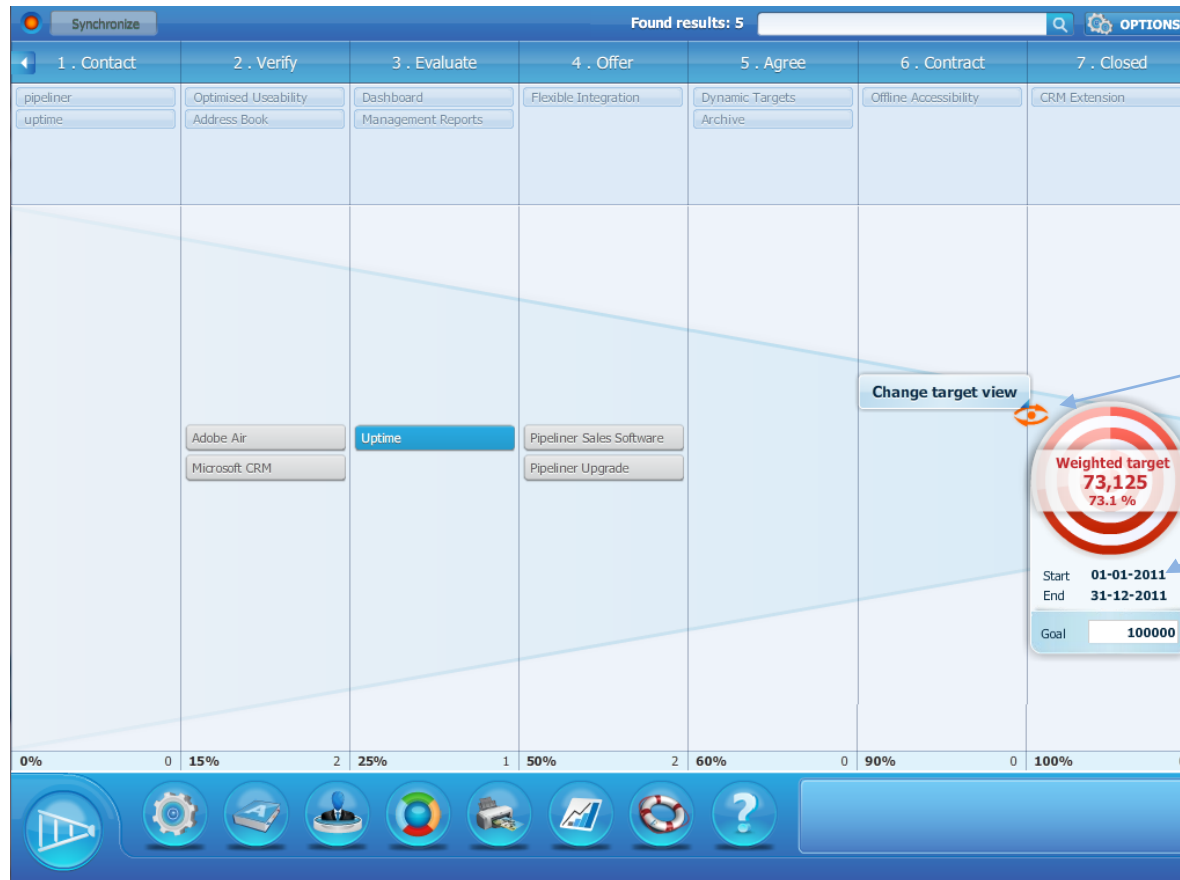
1

Insert all mandatory fields:

- opportunity name
- opportunity value
- its related account
- closing date

Step 3 Working with Basic Dynamic Target

The basic dynamic target enables you to see your sales business condition according to the opportunities values and their position in sales steps. Moreover, you can setup target goal value to see efficiency of your sales business.



- 1 By clicking changing sign, you can alter its display. Moreover, by clicking on the dynamic target, you can enroll its main details.
- 2 See target period.
- 3 Insert dynamic target goal value. This field is optional.

Step 4 Sale process (moving the opportunity)

The sales process is based on moving the opportunity along the sales steps with the purpose to get it to the final sales step. Every sales step has its own value of probability i.e. how much of the opportunity value is contributed to the target. Moving the opportunity from one sales step to another with virtually raise your probability of achievement of your business. The main goal is to move the opportunity to the last sales step in order to finish and close the opportunity.

