



pipeliner
the unique selling power

www.pipelinersales.com

powered by  **up
time**
ITechnologies

p-one

quick guide

Version 3.0

pipeliner quick guide

p – one

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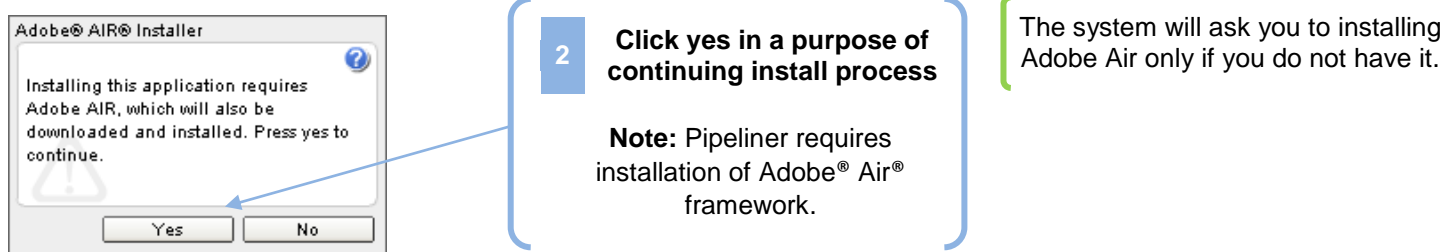
Adobe® AIR® is either registered trademark or trademark of Adobe Systems Incorporated in the United States and/or other countries.

Quick pipeliner install

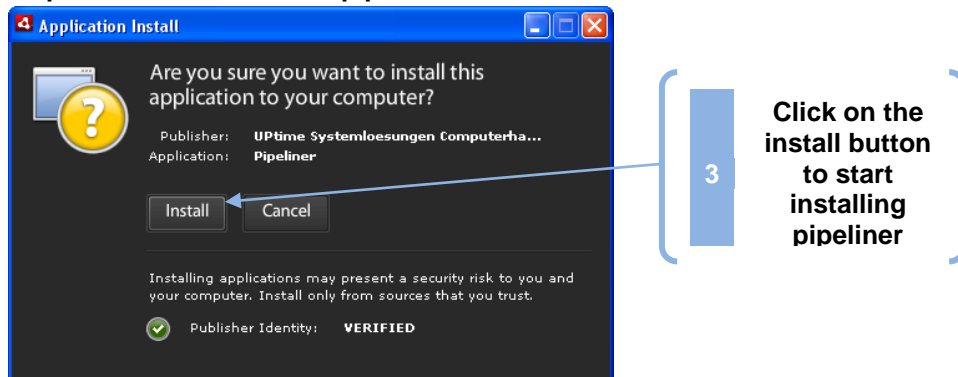
1. Step – Select the pipeliner language and start installation



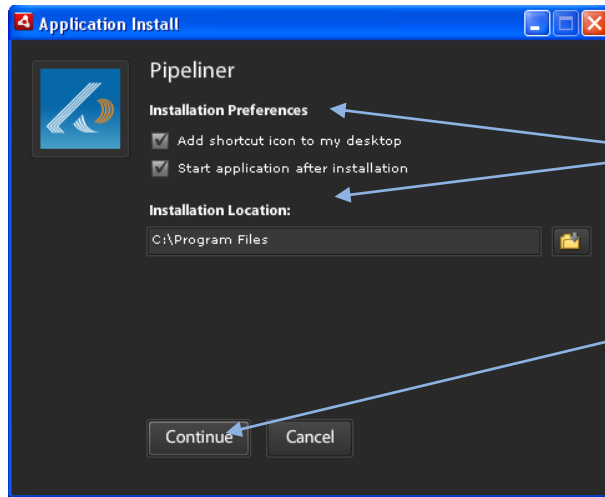
2. Step – Submit Adobe AIR installation



3. Step – Start installation of pipeliner



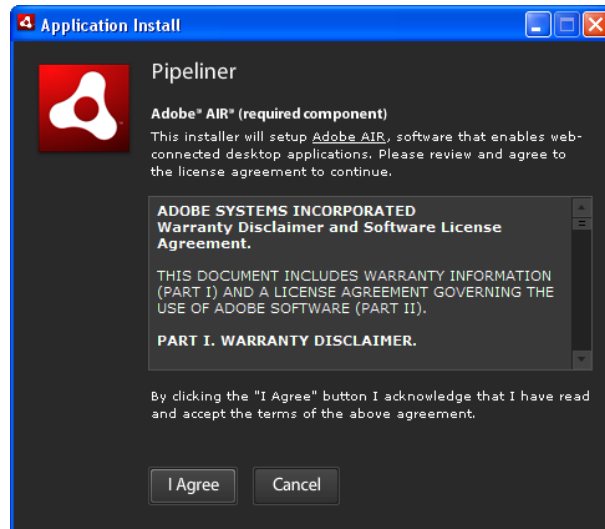
4. Step - Setting up pipeliner installation preferences and location



4 Customize your installation preferences and location

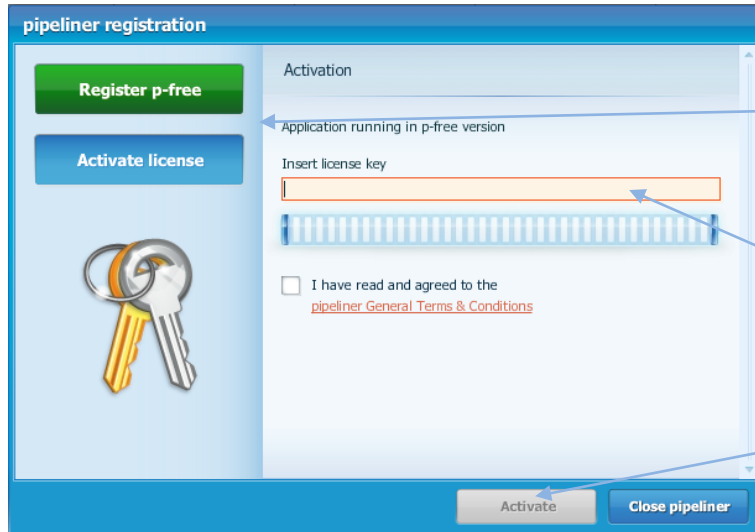
5 Click continue to proceed

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.

Activation through registration form



The screenshot shows the 'pipeliner registration' window. On the left, there are two buttons: 'Register p-free' (green) and 'Activate license' (blue). Below them is an image of two keys. The main area is titled 'Activation' and contains the following text: 'Application running in p-free version', 'Insert license key', a text input field, a license key display field, and a checkbox with the text 'I have read and agreed to the [pipeliner General Terms & Conditions](#)'. At the bottom, there are two buttons: 'Activate' and 'Close pipeliner'.

1 Select the option „Activate license“

2 Insert the issued serial key

3 Click on the activation button to activate licensed version of pipeliner

Insert the issued serial key in this style:
XXXXX-XXXXX-XXXXX-XXXXX-XXXXX

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 – p-one version

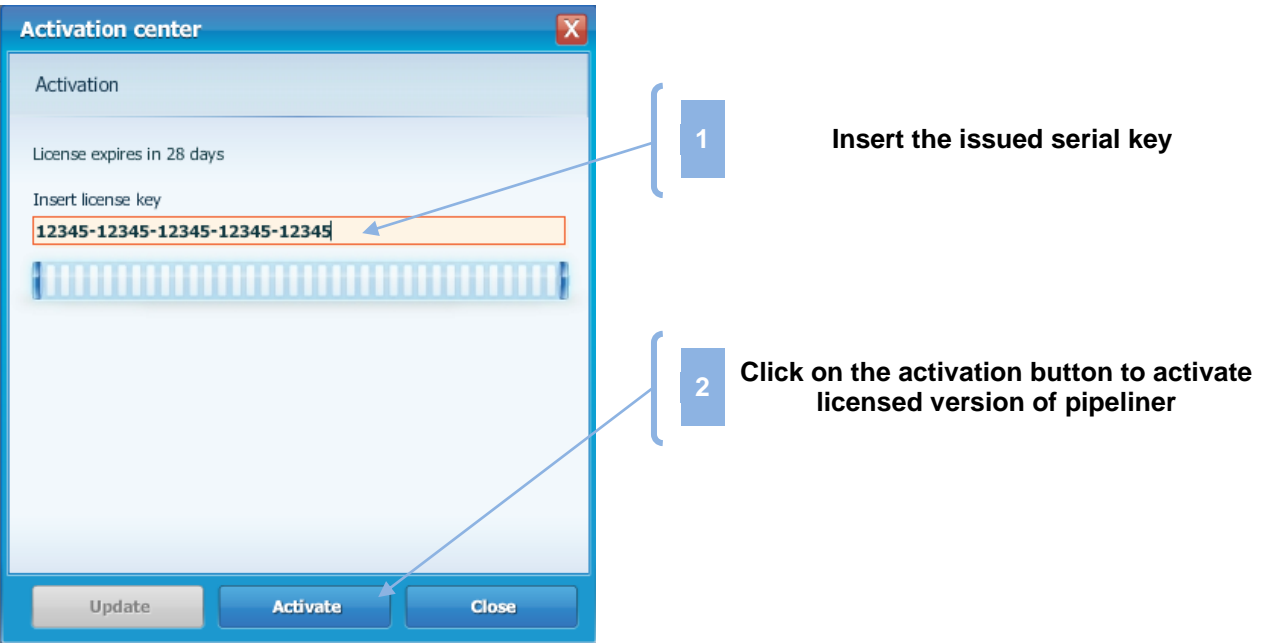
Step 1 Activate licensed version

Activation of pipeliner is available only through the Internet. Therefore, you need to make sure that you have a connection to it. Moreover, by purchasing a license, you will receive a license key, which is necessary for the activation.

How to get there



Pipeliner menu > Online services > Pipeliner activation




1 Insert the issued serial key

2 Click on the activation button to activate licensed version of pipeliner

Step 2 Setup pipeline

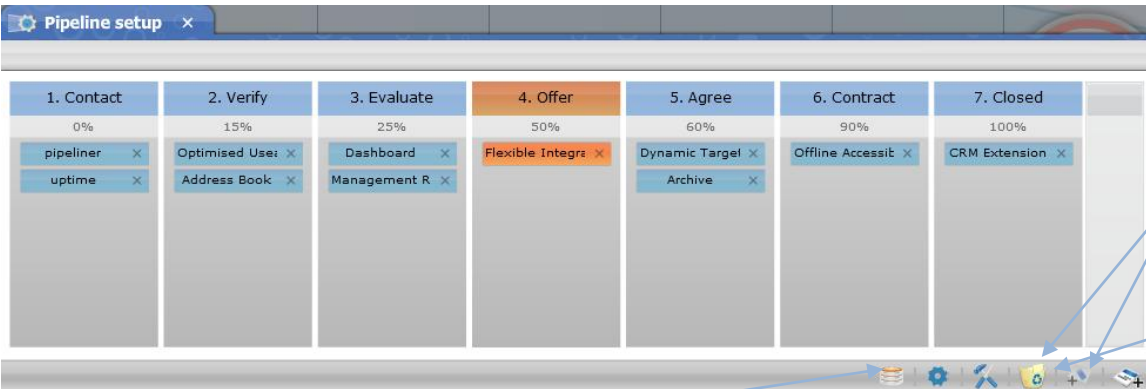
At the beginning, you have to configure your pipeline setup. Pipeline consists of sales steps, its percentage of probability and documents templates. Setting up the configuration of all these features will help you to follow your business sales strategy.

How to get there



Pipeline center

Pipeline 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 x uptime x	Optimised Use: x Address Book x	Dashboard x Management R x	Flexible Integr: x	Dynamic Target x Archive x	Offline Accessit x	CRM Extension x

1 Add/remove sales step

2 Add/remove document template

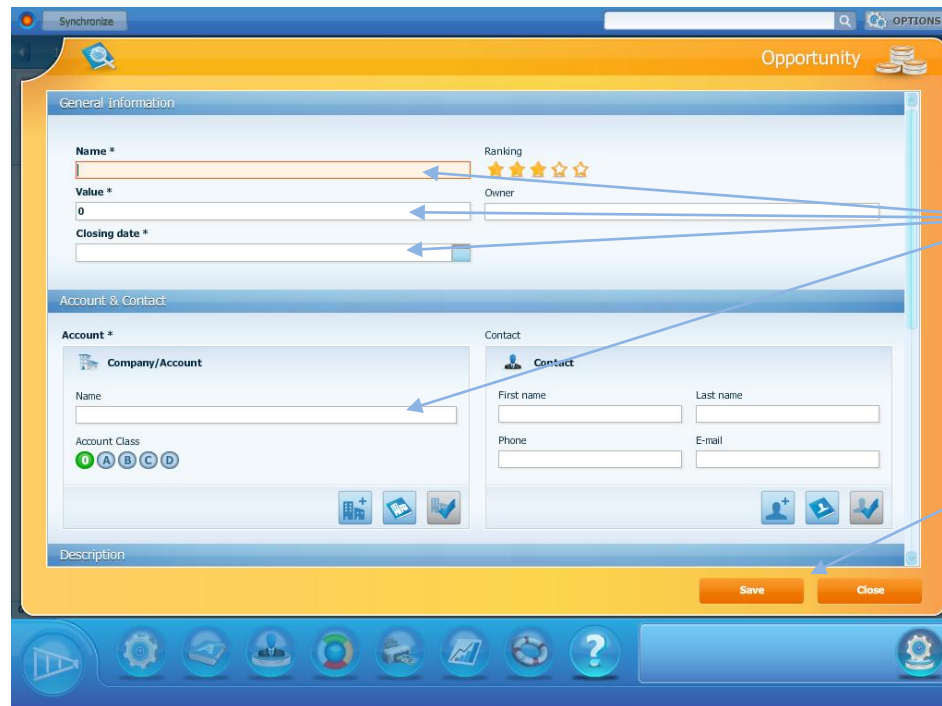
3 Edit name of sales step, document

4 Edit document template

5 Edit currency symbol

Step 3 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

Fill all mandatory fields:

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

2

Click on the save button to create opportunity

Step 4 Working with dynamic target

The dynamic target enables you to customize exact time period 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.



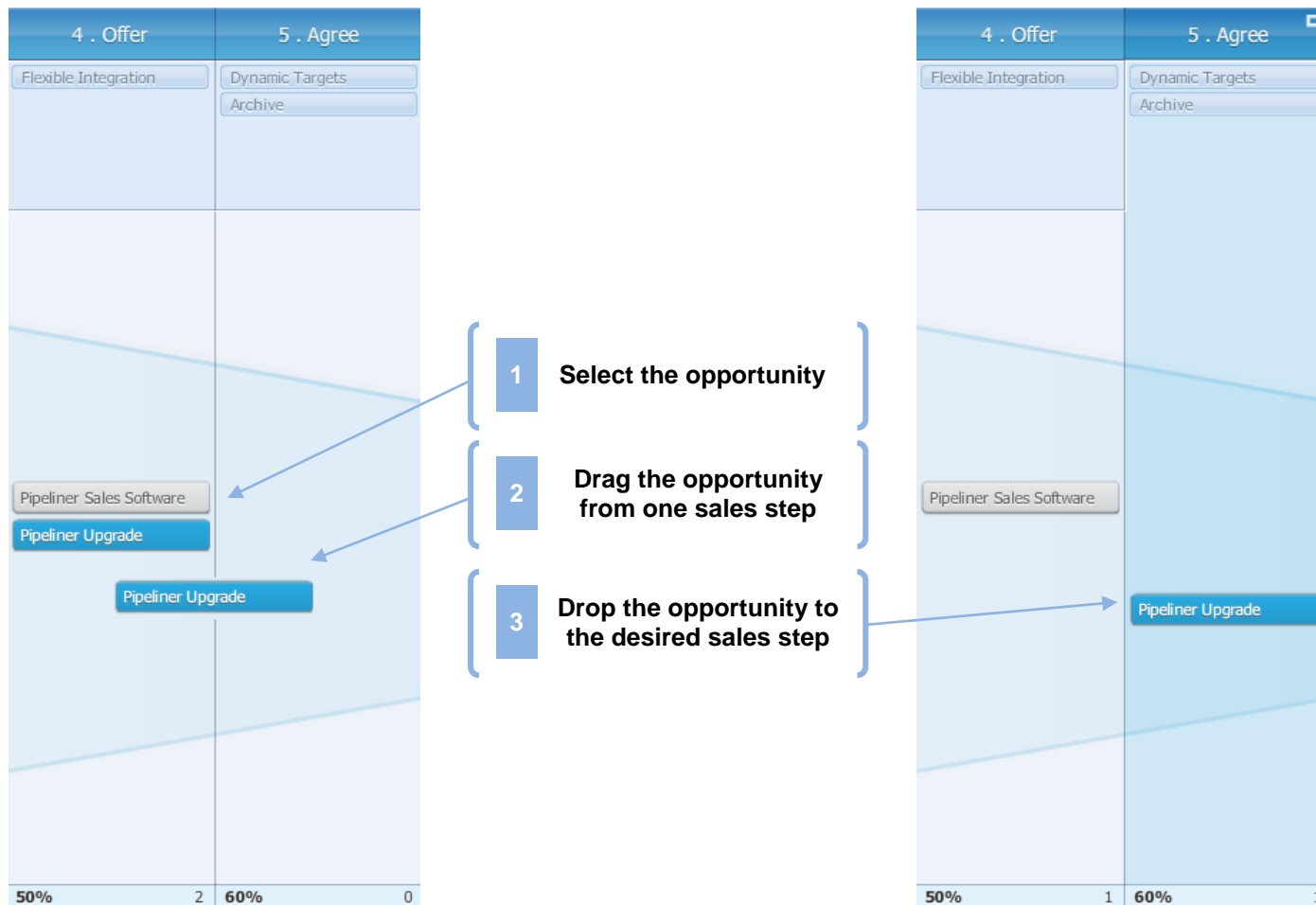
1 Click on the filter to enroll its options and select dynamic target settings

2 Select target period, you want to use.

3 Insert dynamic target goal value. This field is optional.

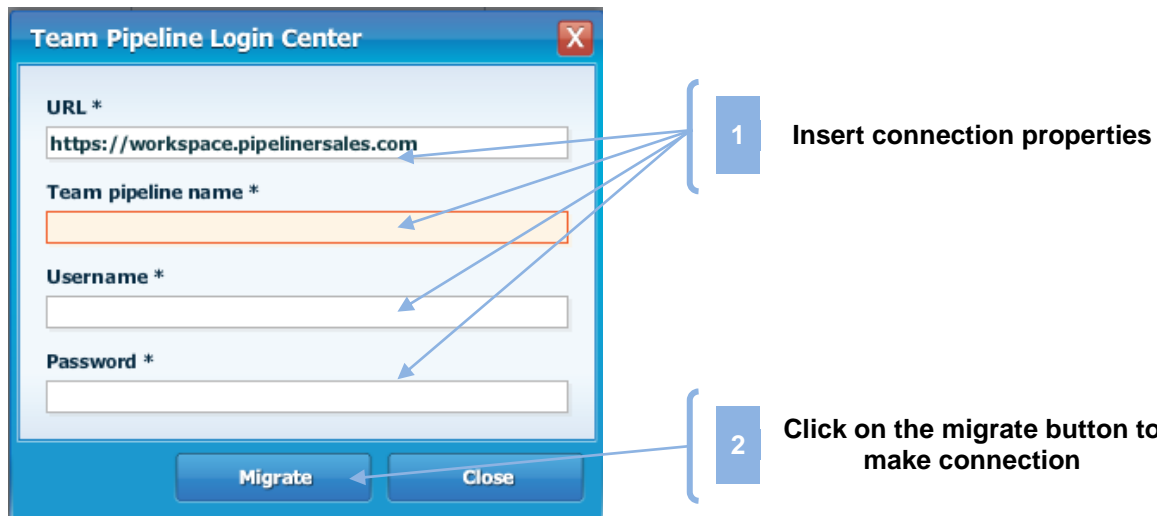
Step 5 Sale process (moving the opportunity)

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.



Migration of single local Pipeline to Team Pipeline

If you have been using p-one licensed version of pipeliner and you would like to move to team version without losing your data, you have to migrate your pipeliner in order to connect them. Basically, you have to unitize your single-user pipeline to team pipeline.

Migration wizard

1 Sales step migration | 2 Document migration

< Back | Next >

Use recommended configuration

Local pipeline	Notice	Identify	Validate	Qualify	Propose	Close	Implement
Team pipeline	Notice	Identify	Validate	Qualify	Propose	Close	Implement

Empty configuration

3 **Configure sales step migration and click next.**

Migration wizard

1 Sales step migration | 2 Document migration

< Back | Apply

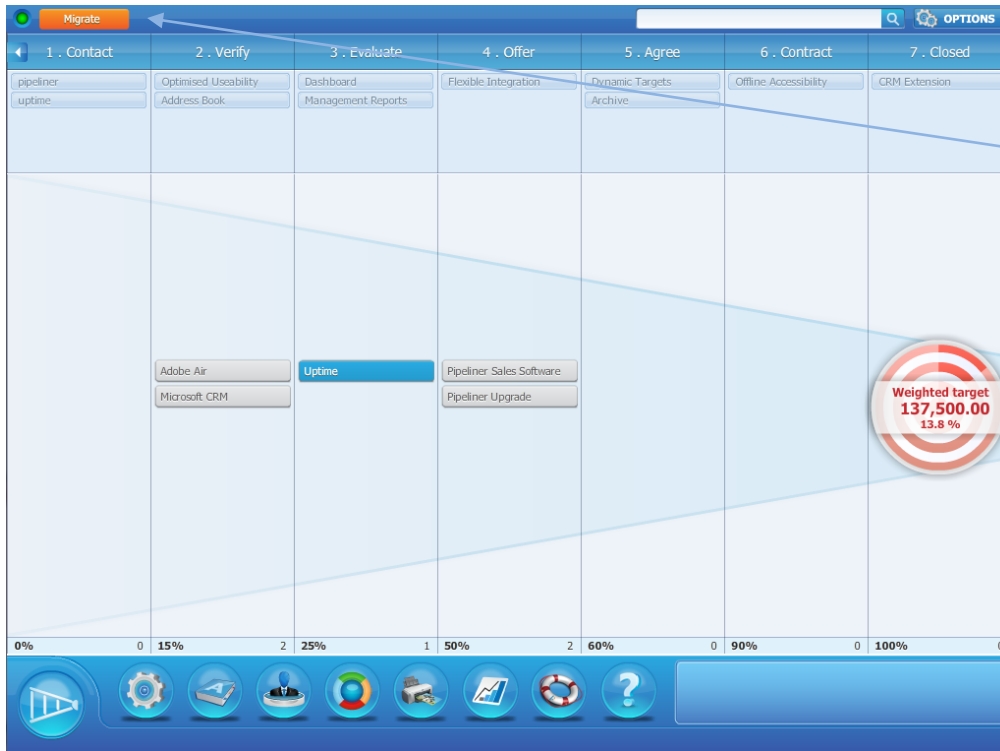
Use matching by document's position

Documents in local pipeline	Notice	Identify	Validate	Qualify	Propose	Close	Implement
Documents in team pipeline	Notice	Identify	Validate	Qualify	Propose	Close	Implement

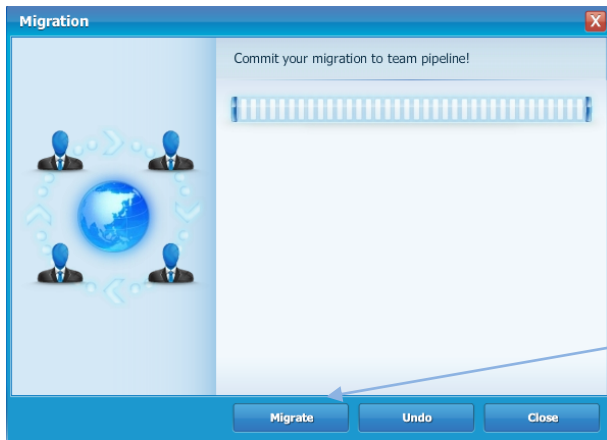
Use matching by document's name

Empty configuration

4 **Configure document migration and click apply**



5 Click on the migrate button to continue



6 Click on the migrate button to finish migration