



# pipeliner

*the unique selling power*

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time**  
ITechnologies

team version

quick guide

Version 3.0

## pipeliner quick guide

Team Versions (p – prime, p – plus, p – max)

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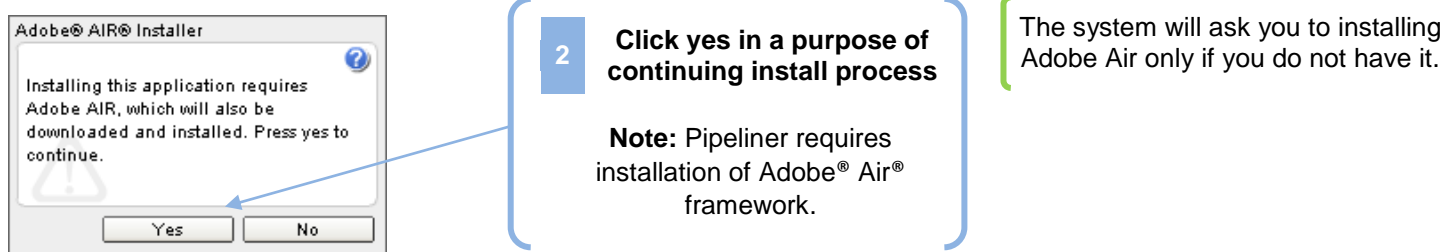
Adobe® AIR® is either registered trademark or trademark of Adobe Systems Incorporated in the United States and/or other countries.

## Quick pipeliner install

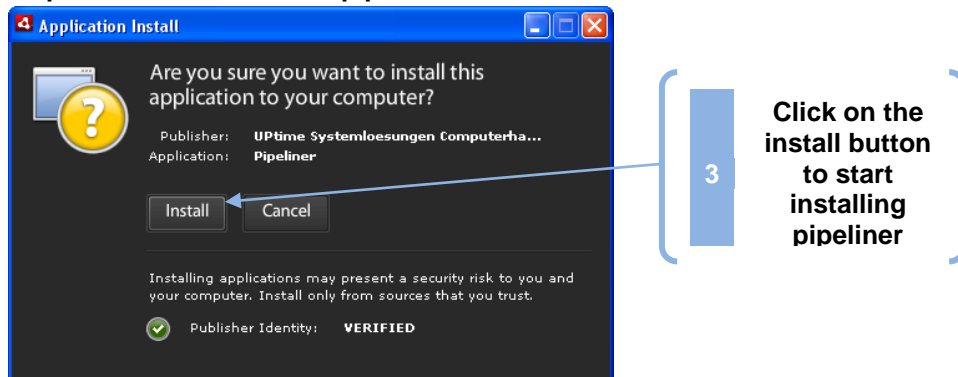
### 1. Step – Select the pipeliner language and start installation



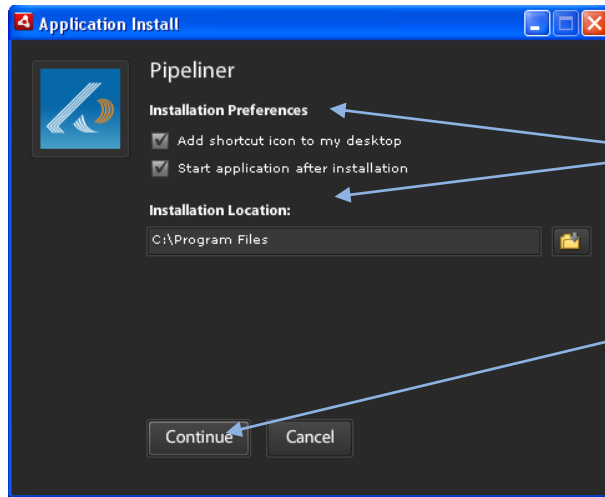
### 2. Step – Submit Adobe AIR installation



### 3. Step – Start installation of pipeliner

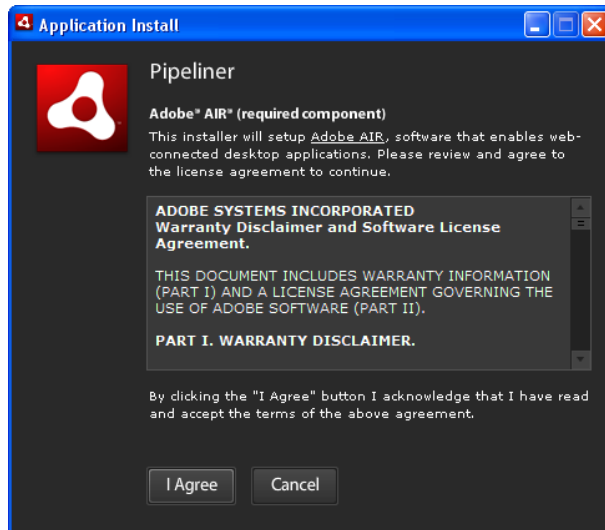


#### 4. Step - Setting up pipeliner installation preferences and location



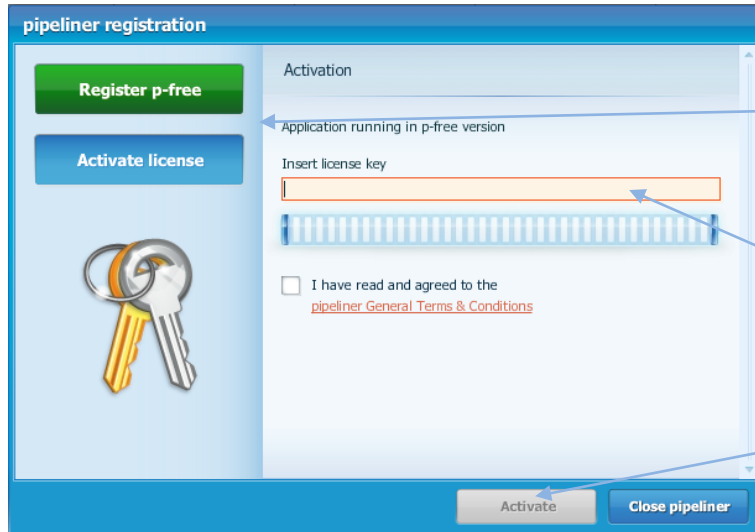
- 4 Customize your installation preferences and location
- 5 Click continue to proceed

#### 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' followed by a text input field and a character selection bar, 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)

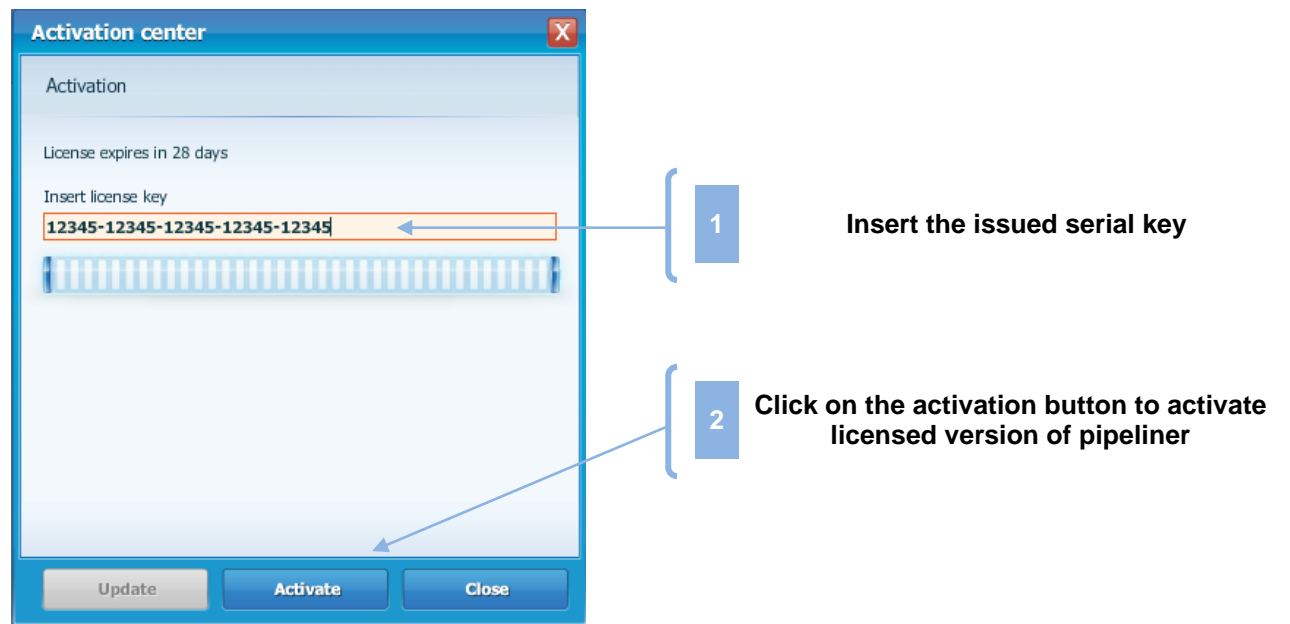
Pipeliner has three main features, which help you to see your business competence according to your desired target. Firstly, there is target, which, inter alia, shows you the actual status of your business efficiency. Secondly, pipeliner setup, where you can configure e.g. number of sales steps with 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-plus version

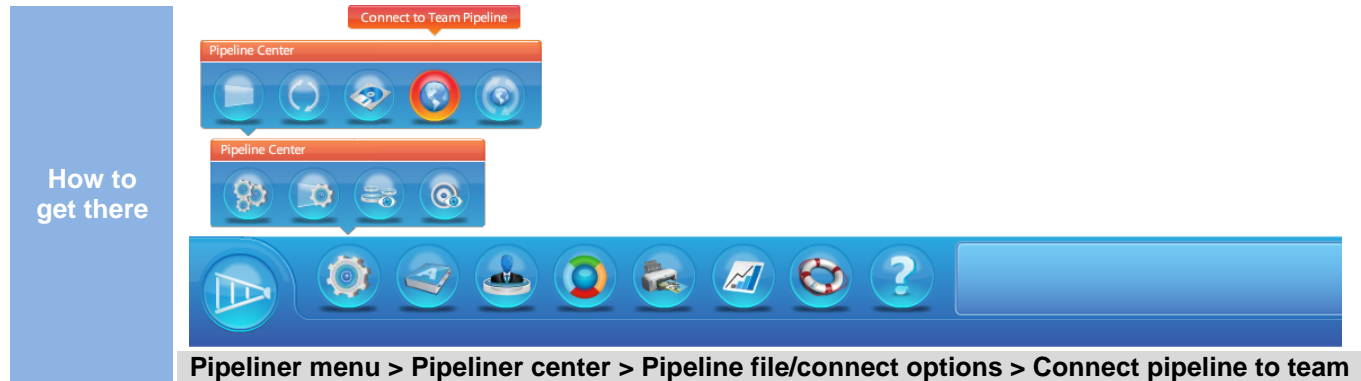
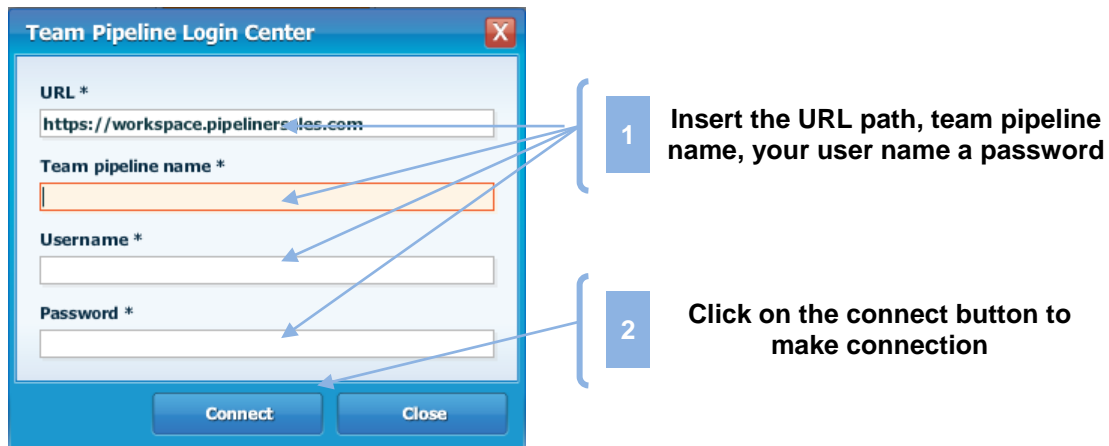
### Step 1 Activate licensed version

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.



## Step 2 Connect to team pipeline

It is recommended to connect to team pipeline immediately after successful activation of licensed version. Please note that you can connect to your team pipeline from every computer under the two circumstances: it has installed pipeliner and connection to the Internet.

**Team Pipeline Login Center**

URL \*

Team pipeline name \*

Username \*

Password \*

Connect Close


1 Insert the URL path, team pipeline name, your user name a password

2 Click on the connect button to make connection

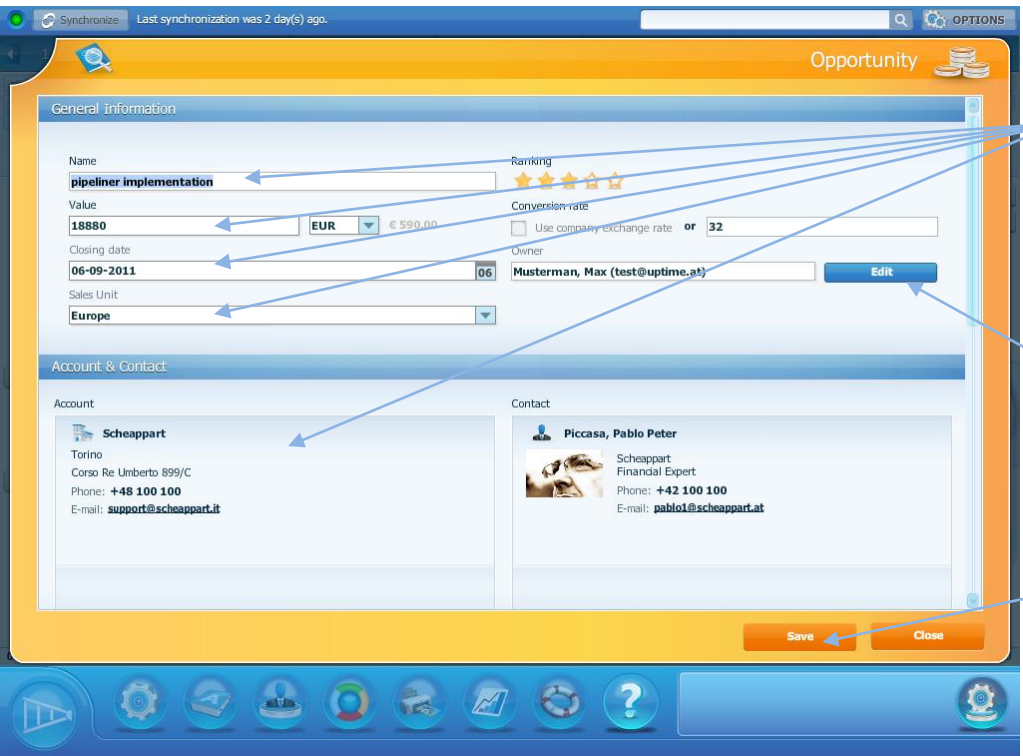
### Step 3 Feed pipeline (add opportunities)

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 has. You have to “feed” your pipeline with opportunities. Do not forget to select the owner and team members for the opportunity! Only team members can see and share the information about one’s opportunity.

How to get there

Create new opportunity


Pipeliner menu > Create new opportunity



**1**

**Fill all mandatory fields:**

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

**2**


**Select the owner of the opportunity**

**3**

**Click on the save button to create opportunity**

#### Step 4 Working with Sales 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.



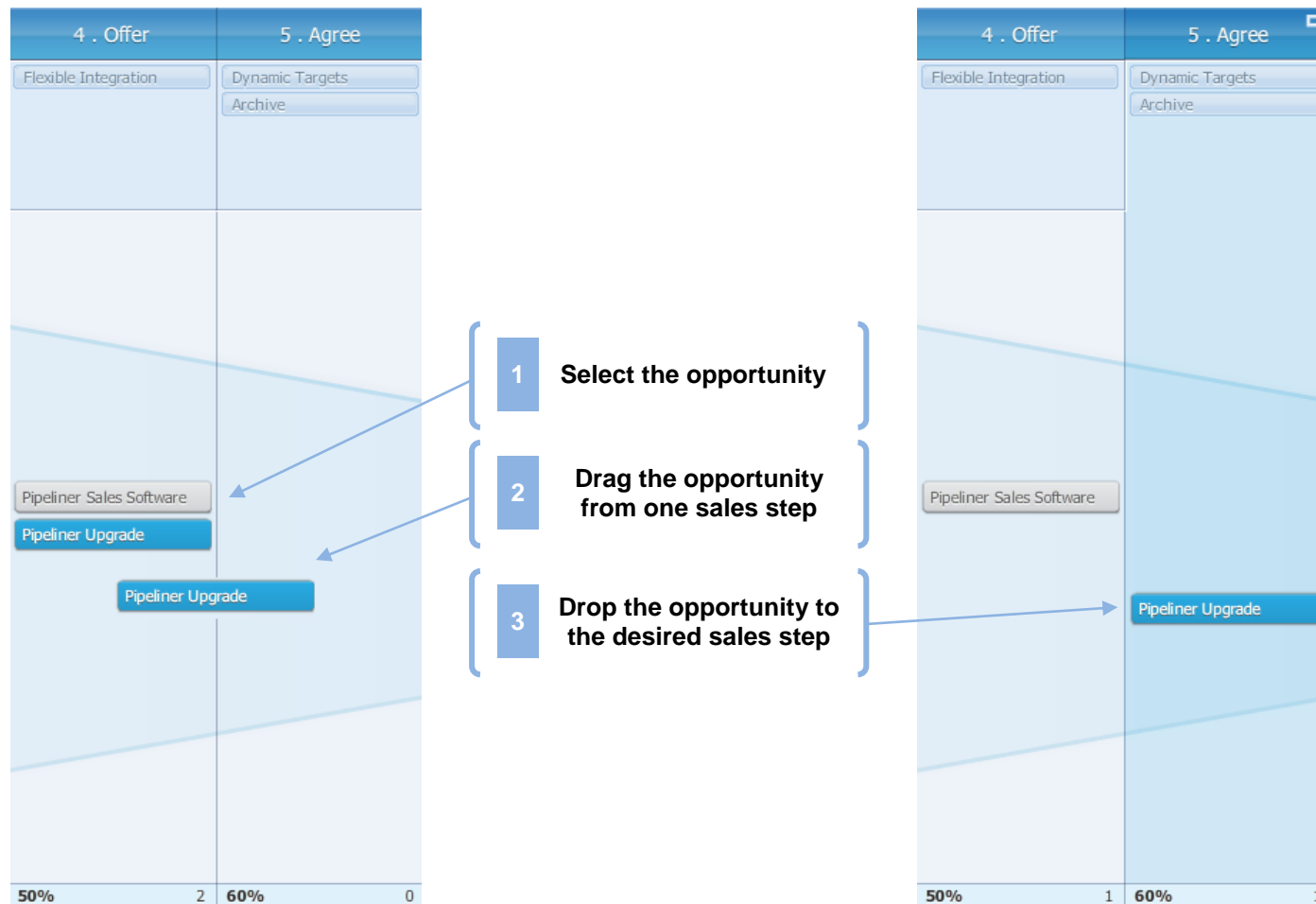
**1** Click on the filter to enroll its options and select dynamic target settings

**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.



## Step 6 Collaborate with your team members

Collaboration in pipeliner is based on synchronizing your local pipeline with team pipeline. During synchronization, all data from local pipeline are sent and stored on the online server pipeline, and vice versa. Therefore, it is recommended to synchronize your pipeline after your changes have been made in order to see all changes made by your sales team members as well.



1 Click on the synchronize button to synchronize your pipeline

Scheme showing the synchronize process

