

Pipeliners CRM Arithmetica Guide

Administration & Setup



Administration & Setup

Learn how to manage your sales team with Pipeliner Sales CRM Application.

CONTENT

1. Managing Pipeliner's Users	3
1.1. How do I invite my colleague to my Sales Pipeline	3
1.2. How do I create Sales Territory	4
1.3. How do I manage User Role & Rights	5
1.4. How do I assign Role and Rights to User	6
2. Customizing Sales Pipelines	7
2.1. How do I configure Sales Pipeline	7
2.2. How do I create Custom Field	8
2.3. How do I add Custom Field to Form	9
2.4. How do I customize Common Lists	10

1. Managing Pipelinier's Users

1.1. How do I invite my colleague to my Sales Pipeline

Pipelinier is a great tool for sales teams. You are able to share and collaborate on your sales leads, opportunities, accounts, contacts, tasks, meetings and many more cool features. It's almost a sin not to invite other co-workers to join your sales force.

My Sales Space > Users & Rights

General

Sales Space

Users & Roles

Users & Rights

User Roles

Currencies

Products & Prices

Common Lists

Fields & Forms

Misc

Learn more about users and rights

Show Help

Actual licenses usage

Number of licenses

0 Licenses

30 Licenses

Number of licenses

30

Free licenses

7

Users

+ Invite user(s)

5

First Name	Last Name	E-mail	Status	User Role	Action
Robert	Godany	robert.godany@pipelinier	Inactive	Standard user & admin	✓
Radoslav	Ciglansky	rc@pipelinersales.com	Active	Standard user & admin	✕ ✎
Peter	Blažej	p.blazej@pipelinersales	Inactive	Standard user & admin	✓
Nikolaus	Kimla	n.kimla@uptime.at	Active	Standard user & admin	✕ ✎
Milos	Krocian	m.krocian@pipelinersalk	Inactive	Standard user & admin	✓

View 1 - 5 of 22

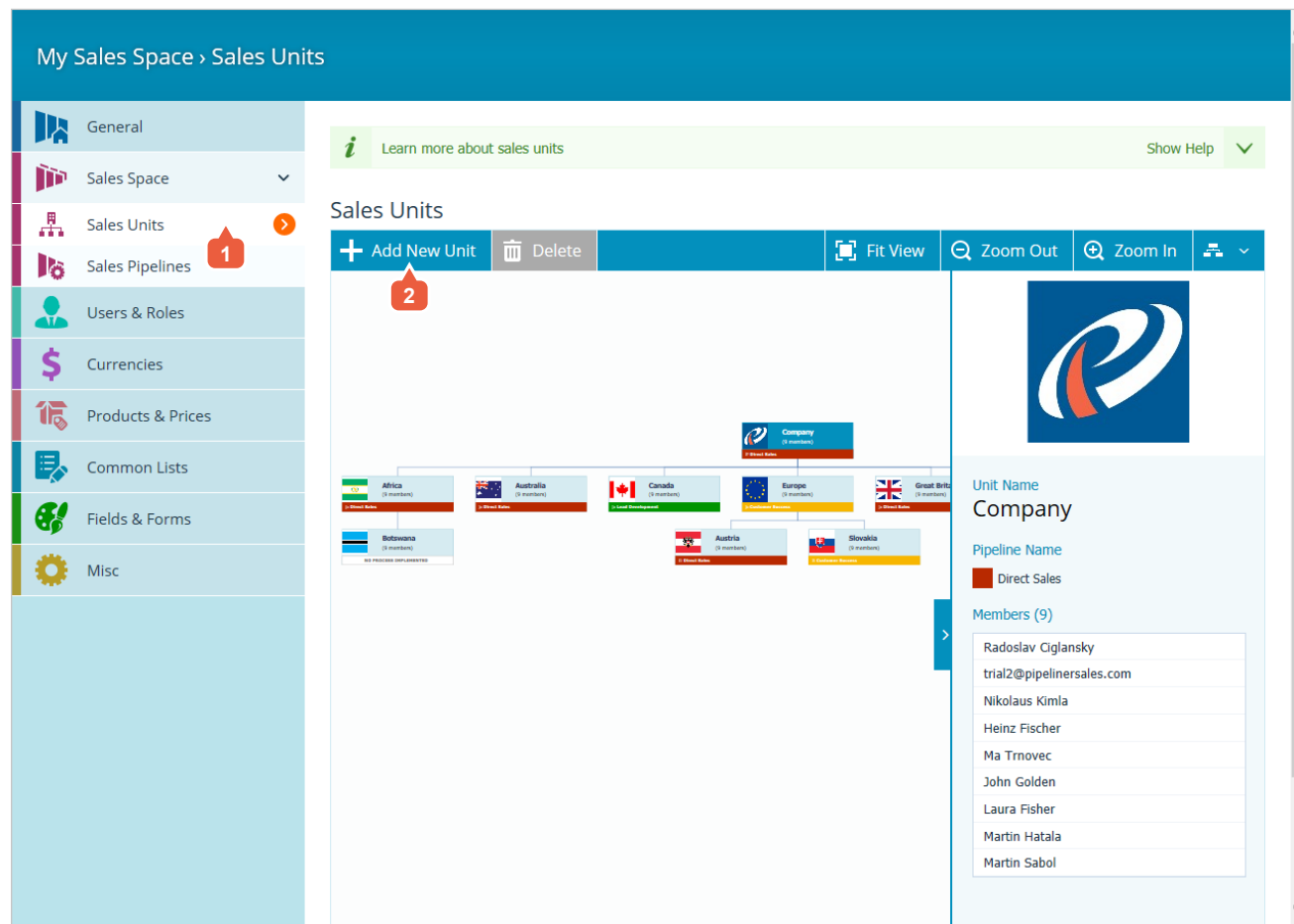
Page 1 of 5

DESCRIPTION

- Click on the USERS & ROLES and within the main admin menu click on the USERS & RIGHTS.
- Click on the INVITE USER(S) and enter an e-mail to invite your co-workers to join your sales pipeline.

1.2. How do I create Sales Territory

Pipeler can extremely help you to organize your sales activities by creating sales territories. Pipeler lets you depict your entire sales structure, breaking it down into individual sales units. Each Pipeler user can be assigned to one or more sales units as a sales rep or sales manager with their related user rights.



My Sales Space > Sales Units

General

Sales Space

Sales Units **1**

Sales Pipelines

Users & Roles

Currencies

Products & Prices

Common Lists

Fields & Forms

Misc

Learn more about sales units Show Help

Sales Units

+ Add New Unit **2** Delete Fit View Zoom Out Zoom In

Company (9 members)

Africa (2 members)

Australia (2 members)

Canada (2 members)

Europe (2 members)

Great Brit (2 members)

Botswana (2 members)

Austria (2 members)

Slovakia (2 members)

Unit Name
Company

Pipeline Name
Direct Sales

Members (9)

- Radoslav Ciglansky
- trial2@pipelersales.com
- Nikolaus Kimla
- Heinz Fischer
- Ma Trnovec
- John Golden
- Laura Fisher
- Martin Hatala
- Martin Sabol

DESCRIPTION

- 1 Click on the SALES SPACE and within the main admin menu click on the SALES UNITS.
- 2 Select parent unit and click ADD NEW UNIT. Enter the name of your sales territory. You can even select the parent Sales Unit.

1.3. How do I manage User Role & Rights

With Pipelinier you are able to set security roles for all Pipelinier users by applying access rights for all features and fields within Pipelinier for each of them. Multiple pipeline preferences.

My Sales Space > User Roles

General

Sales Space

Users & Roles

Users & Rights

User Roles

Currencies

Products & Prices

Common Lists

Fields & Forms



Misc

Learn more about user's roles and permissions Show Help

+ Create

30

↺

Role Name	Action
Standard user	 
Standard user & admin	

View 1 - 2 of 2

<<

<

Page 1

>

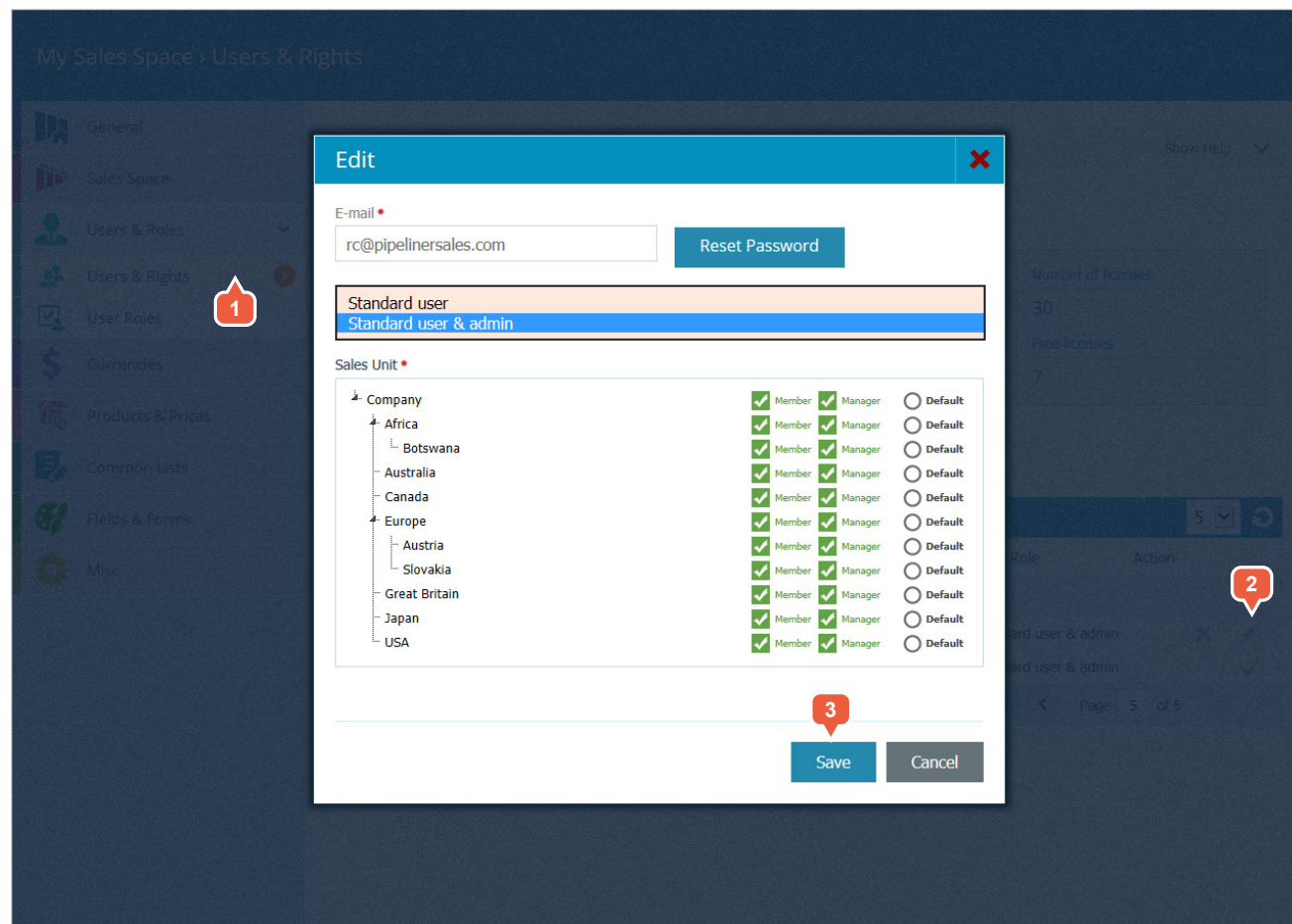
>>

DESCRIPTION

- 1 Click on the USERS & ROLES and within the main admin menu click on the USER ROLES.
- 2 Click on the CREATE and define the access rights for it.

1.4. How do I assign Role and Rights to User

Pipeler lets you set security roles for all Pipeler users by applying access rights for all features and fields within Pipeler for each of them.



DESCRIPTION

- 1 Click on the USERS & ROLES and within the main admin menu click on the USERS & RIGHTS.
- 2 Click on the EDIT icon for the corresponding user.
- 3 Select the new user role for the user and click SAVE.

2. Customizing Sales Pipelines

2.1. How do I configure Sales Pipeline

A sales pipeline is a workspace, sales environment, where you can invite your co-workers to join and work on their sales. Once you define and configure your sales pipeline to copy your sales process it will be beneficial for everybody in your team. You can create multiple Pipelines with different sales process.

My Sales Space > Sales Pipelines

Configure Sales Steps

Pipeline

Direct Sales

Pipeline configurator

Leads - 0% (Leads sales activities are shared between all pipelines) Create Sales Activities

1.	Initial Contact - 5% 25 Day(s)	Edit Sales Activities	4 documents		
2.	Demonstrate - 15% 100 Day(s)	Edit Sales Activities	5 documents		
3.	Value Proposition - 20% 25 Day(s)	Edit Sales Activities	3 documents		
4.	Proposal - 50% 325 Day(s)	Edit Sales Activities	2 documents		
5.	Commitment - 70% 30 Day(s)	Edit Sales Activities	2 documents		
	Closed - 100%		2 documents		

Close

DESCRIPTION

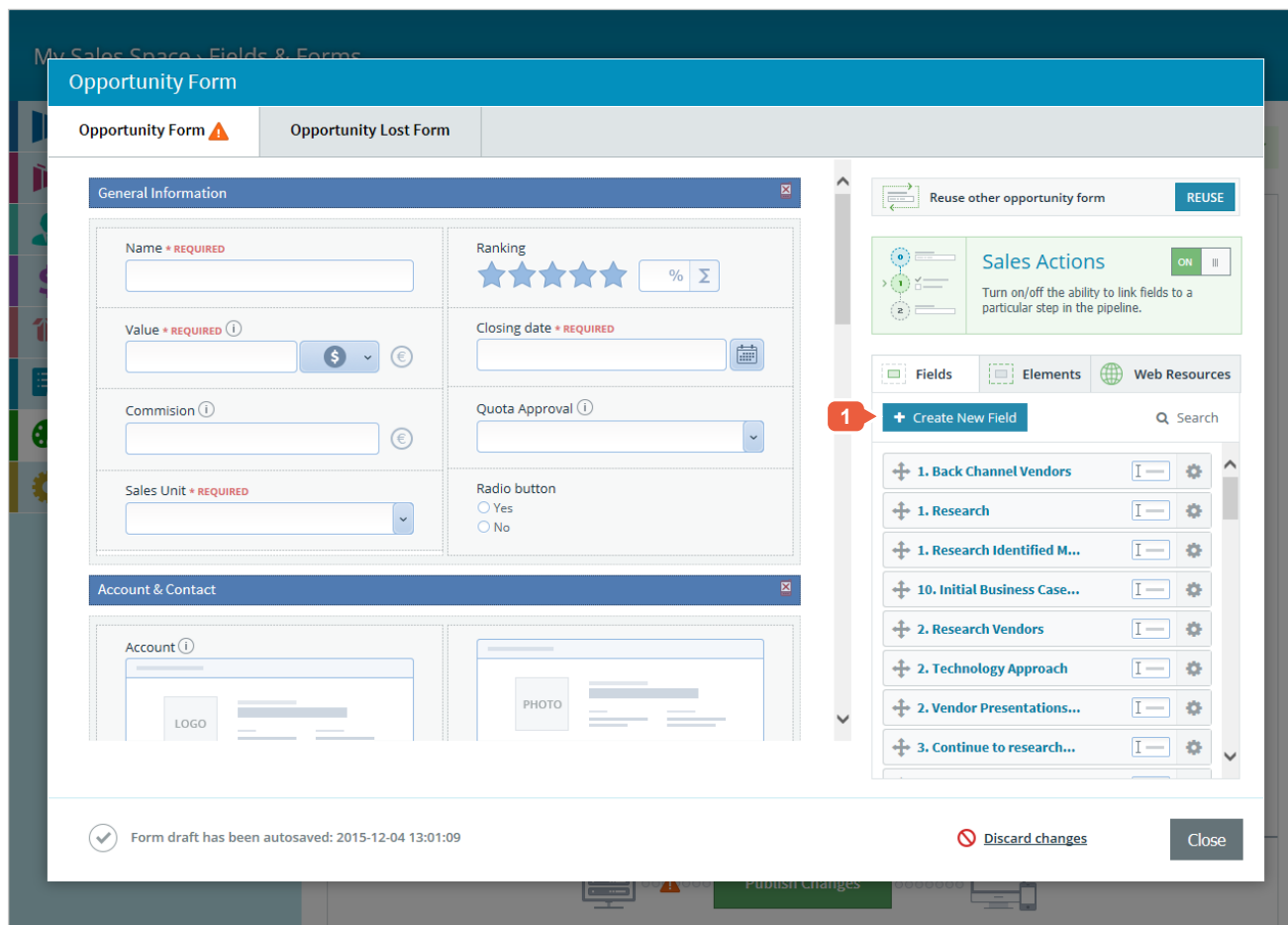
- › Click on the SALES SPACE within the main admin menu and select SALES PIPELINES.
- › Click on ADD NEW PIPELINE or select existing one to edit it.
- › Configure sales steps to fit your sales process. Every Pipeline must contain at least 3 steps.

Administration & Setup > 2. Customizing Sales Pipelines > 2.1. How do I configure Sales Pipeline

7


2.2. How do I create Custom Field

Pipelinier enables you to customize, create, and change individual Pipelinier fields in order to adapt these to your individual sales process and preferences.



My Sales Space > Fields & Forms

Opportunity Form

Opportunity Form  Opportunity Lost Form

General Information

Name * REQUIRED

Value * REQUIRED ⓘ

Commission ⓘ

Sales Unit * REQUIRED

Ranking

Closing date * REQUIRED

Quota Approval ⓘ

Radio button

☐ Yes

☐ No

Account & Contact

Account ⓘ

PHOTO

LOGO

Reuse other opportunity form **REUSE**

Sales Actions **ON**


Turn on/off the ability to link fields to a particular step in the pipeline.

Fields **Elements** **Web Resources**

1 **+ Create New Field** Search

- 1. Back Channel Vendors**
- 1. Research**
- 1. Research Identified M...**
- 10. Initial Business Case...**
- 2. Research Vendors**
- 2. Technology Approach**
- 2. Vendor Presentations...**
- 3. Continue to research...**

Form draft has been autosaved: 2015-12-04 13:01:09

 Discard changes

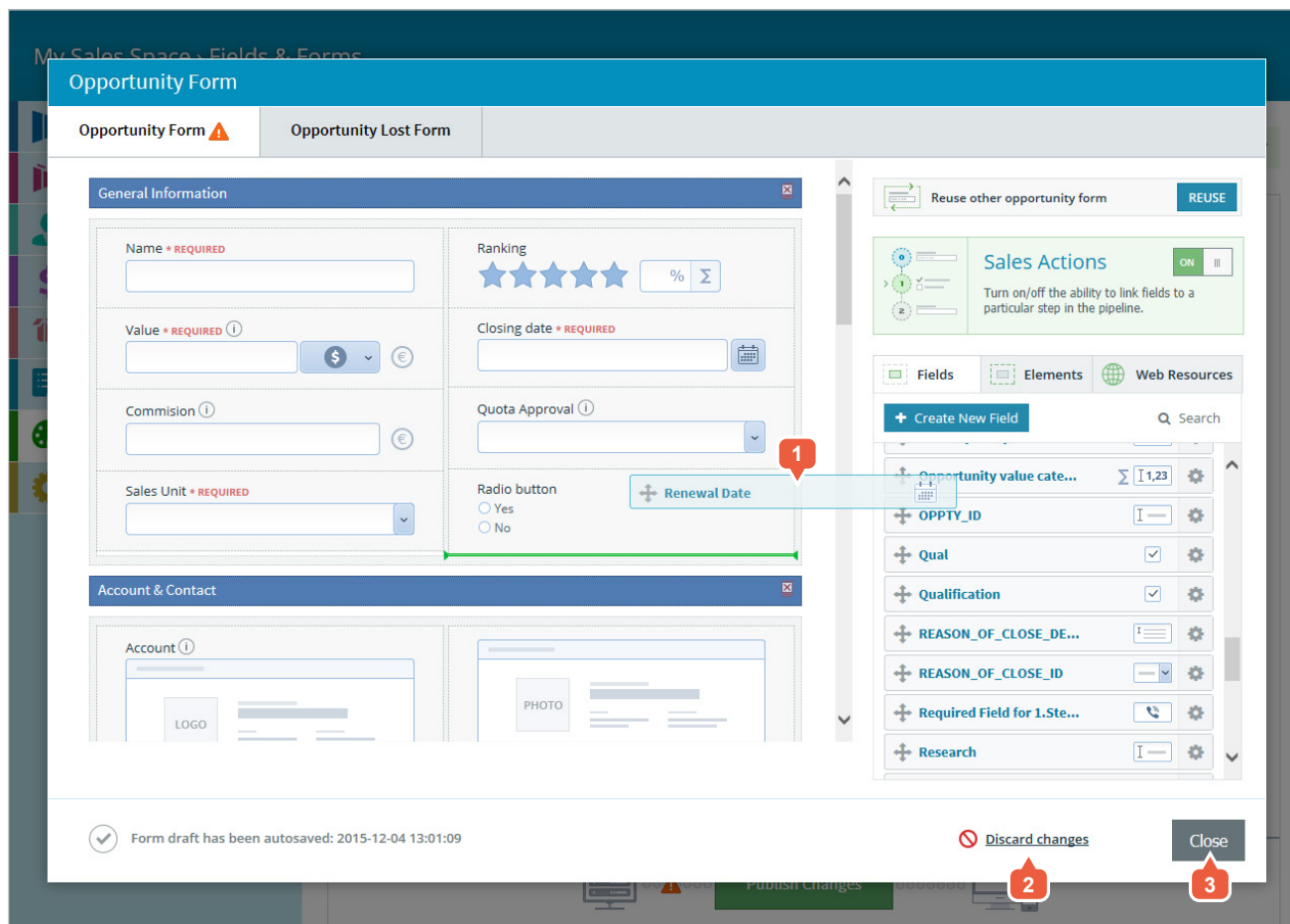
Close

DESCRIPTION

- 1 > Click on the FIELDS & FORMS.
- > Select Form you want to edit and click on EDIT FORM.
- > Click on the CREATE NEW FIELD.

2.3. How do I add Custom Field to Form

Pipeler gives you the chance to alter four main forms in the application: account, contact, opportunity and lead. A form is a complete section of fields within the Pipeler application. Click on the FIELDS & FORMS and select the form you want to edit.



The screenshot displays the 'Opportunity Form' editor. The form is divided into two main sections: 'General Information' and 'Account & Contact'. The 'General Information' section includes fields for Name, Value, Commission, Sales Unit, Ranking, Closing date, Quota Approval, and a Radio button for 'Renewal Date'. The 'Account & Contact' section includes fields for Account and Photo. On the right side, there is a 'Sales Actions' panel with a toggle for 'Turn on/off the ability to link fields to a particular step in the pipeline.' Below this is a 'Fields' panel with a search bar and a list of fields including 'Opportunity value cate...', 'OPPTY_ID', 'Qual', 'Qualification', 'REASON_OF_CLOSE_DE...', 'REASON_OF_CLOSE_ID', 'Required Field for 1.Ste...', and 'Research'. A red arrow labeled '1' points to the 'Renewal Date' field being added to the form. At the bottom, there is a status bar with a checkmark indicating 'Form draft has been autosaved: 2015-12-04 13:01:09', a 'Discard changes' button, and a 'Close' button. Red arrows labeled '2' and '3' point to these buttons respectively.

DESCRIPTION

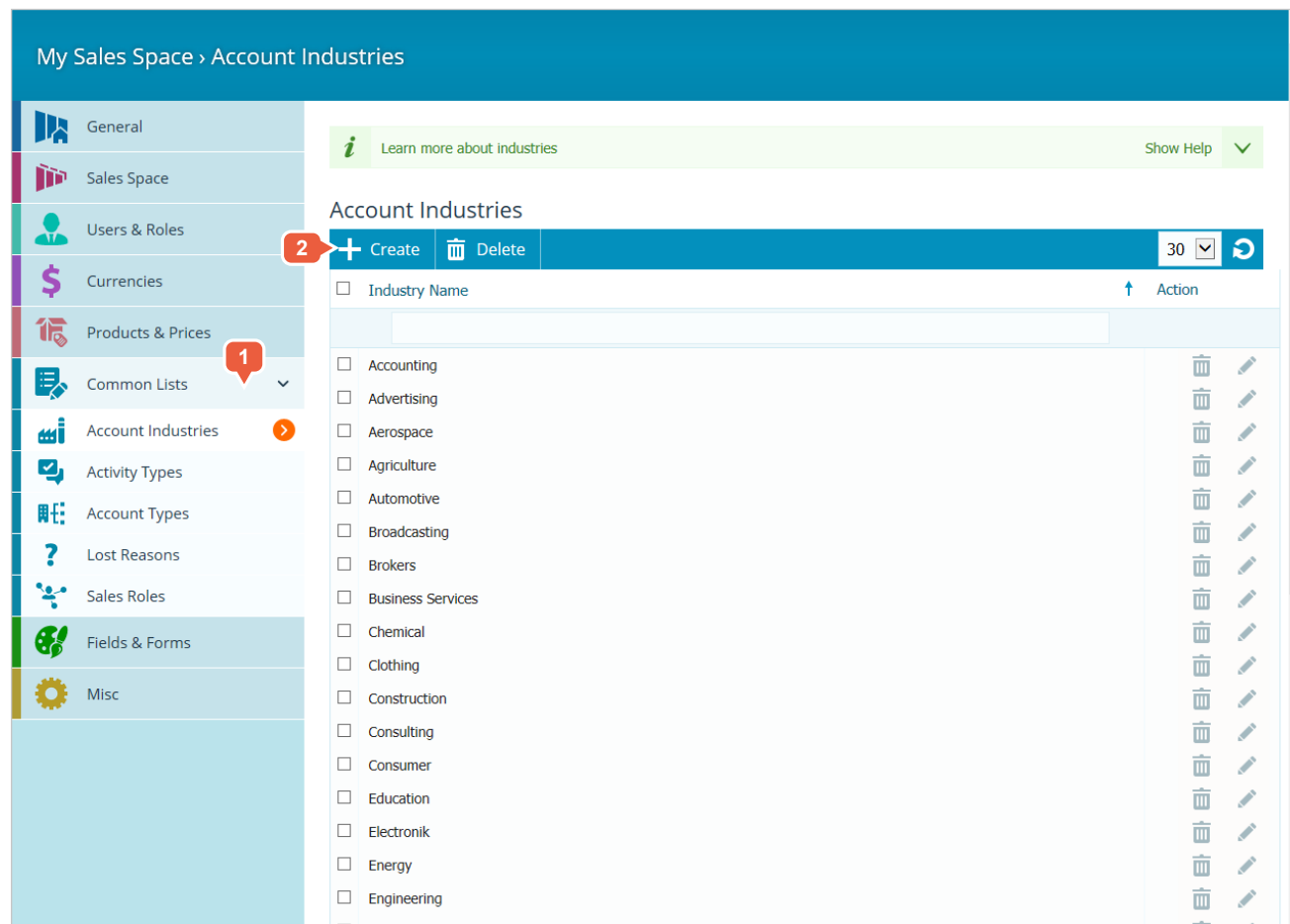
- 1 Select the form and drag your fields from field list into the form.
- 2 Changes are saved automatically once you close the form. If you need to revert the changes please click on DISCARD CHANGES.
- 3 Publish changes you have made after closing the form.



TIP: When you now synchronize Pipeler you will be able to see all your customization you have done.

2.4. How do I customize Common Lists

Pipelinier gives you the change to alter and define five main common lists: industries, tasks types, products, account types, lost reasons list.





































My Sales Space > Account Industries

General
Sales Space
Users & Roles
Currencies
Products & Prices
Common Lists
Account Industries
Activity Types
Account Types
Lost Reasons
Sales Roles
Fields & Forms
Misc

Learn more about industries Show Help

Account Industries

Create Delete 30

Industry Name	Action
<input type="checkbox"/> Accounting	 
<input type="checkbox"/> Advertising	 
<input type="checkbox"/> Aerospace	 
<input type="checkbox"/> Agriculture	 
<input type="checkbox"/> Automotive	 
<input type="checkbox"/> Broadcasting	 
<input type="checkbox"/> Brokers	 
<input type="checkbox"/> Business Services	 
<input type="checkbox"/> Chemical	 
<input type="checkbox"/> Clothing	 
<input type="checkbox"/> Construction	 
<input type="checkbox"/> Consulting	 
<input type="checkbox"/> Consumer	 
<input type="checkbox"/> Education	 
<input type="checkbox"/> Electronik	 
<input type="checkbox"/> Energy	 
<input type="checkbox"/> Engineering	 

DESCRIPTION

- 1 Click on the COMMON LISTS within the main admin menu.
- 2 Select the list you would like to customize let's say lost reasons and click on CREATE.

The information contained in this document represents the current view of Pipelinersales Inc. on the issues discussed as of the date of publication. Because Pipelinersales Inc. must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Pipelinersales Inc., and Pipelinersales Inc. cannot guarantee the accuracy of any information presented after the date of publication. This document is for informational purposes only.

PIPELINERSALES INC. MAKES NO WARRANTIES, EXPRESS, IMPLIED OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the companies, organizations, products, domain names, E-Mail addresses, logos, people, places, and events depicted in

examples herein are fictitious. No association with any real company, organization, product, domain name, E-Mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Pipelinersales Inc.

Pipelinersales Inc. may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Pipelinersales Inc., the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.



www.pipelinersales.com

Visit us and learn more!

© 2015 Pipelinersales Inc.

Microsoft® Office®, Microsoft® Outlook® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.