Pipeliner CRM Arithmetica Guide

Administration & Setup

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Administration & Setup

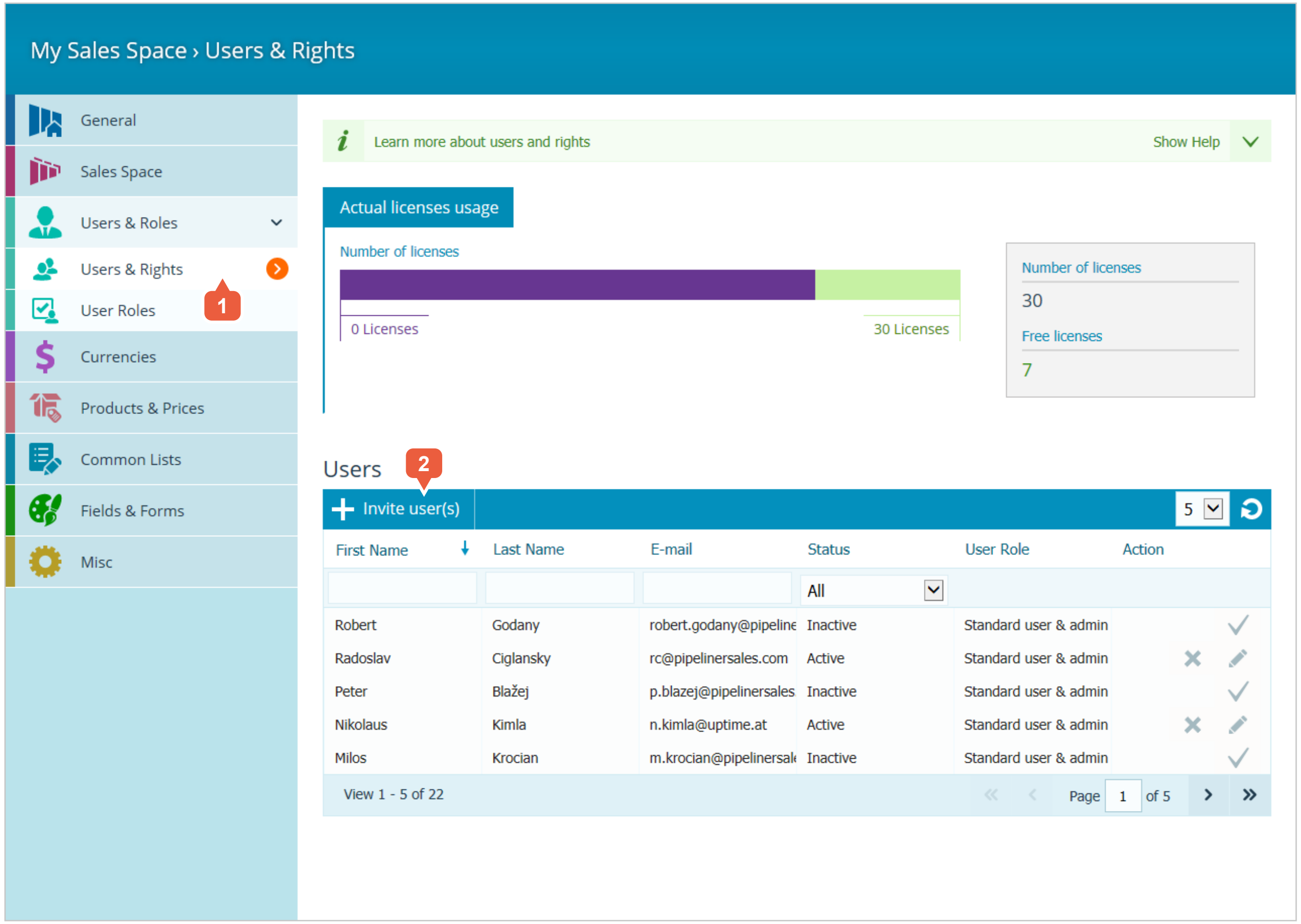
Learn how to manage your sales team with Pipeliner Sales CRM Application.

CONTENT

1. Managing Pipeliner's Users

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

Pipeliner 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.

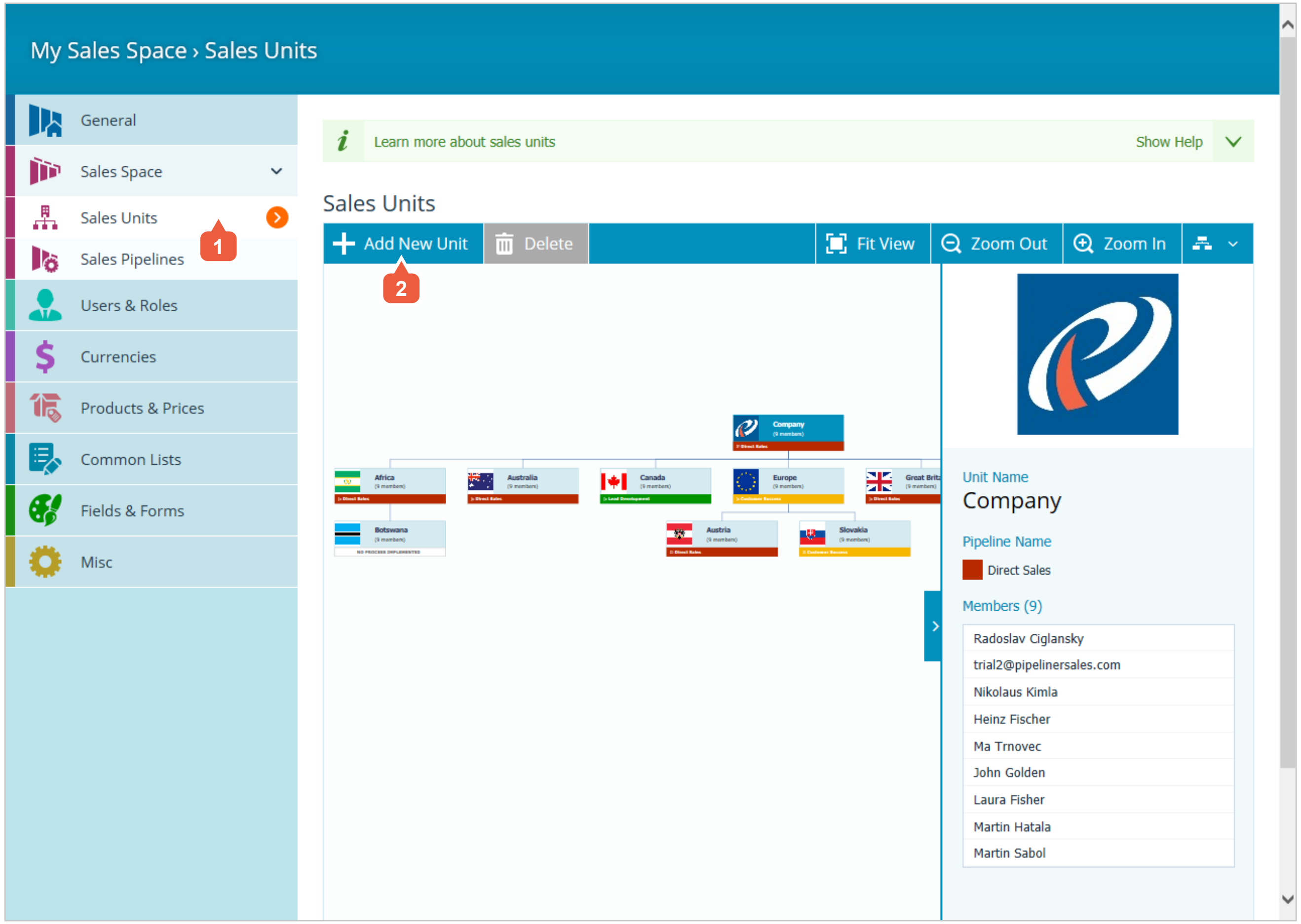


DESCRIPTION

1. Click on the USERS & ROLES and within the main admin menu click on the USERS & RIGHTS.
2. 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

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

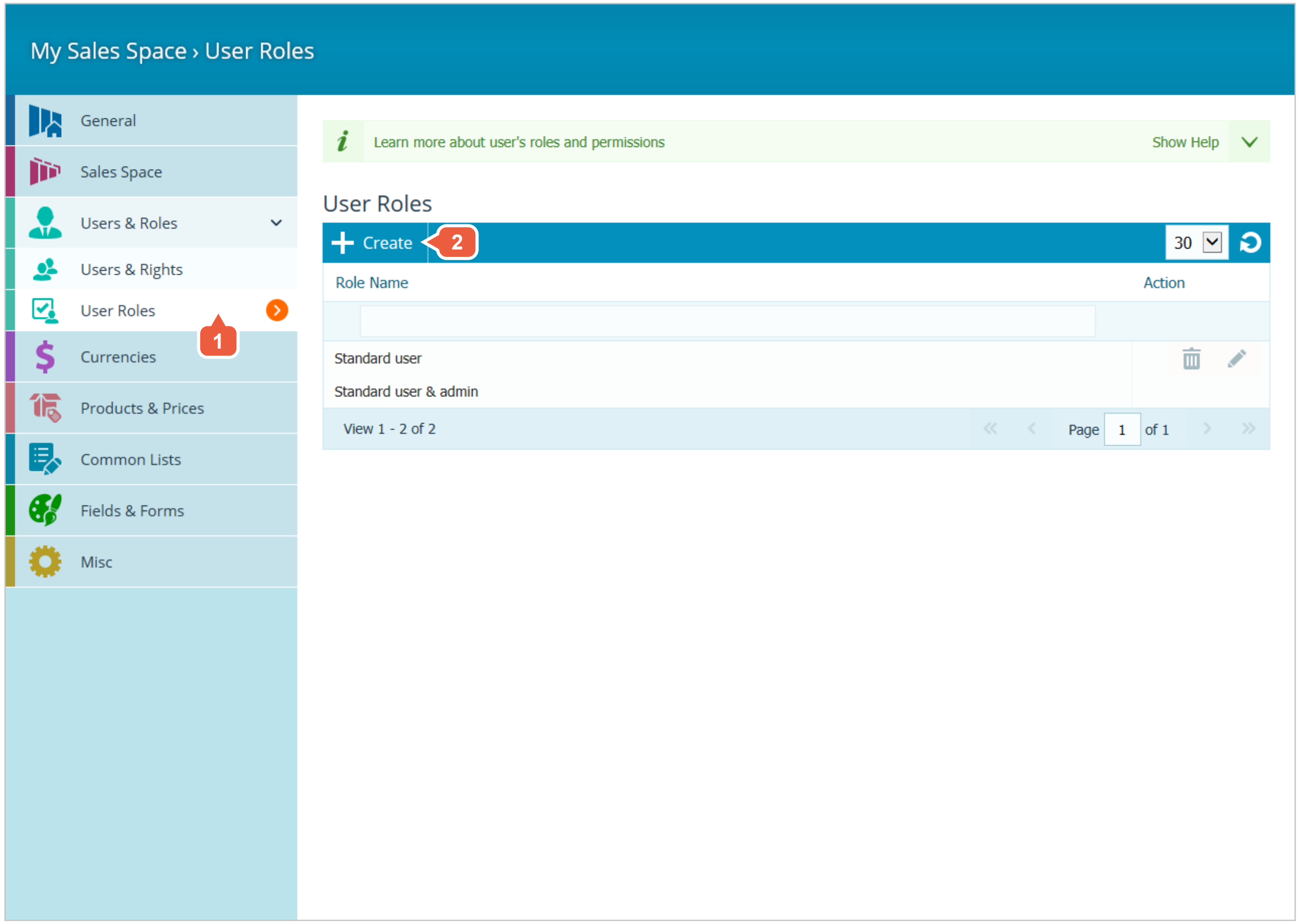


DESCRIPTION

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

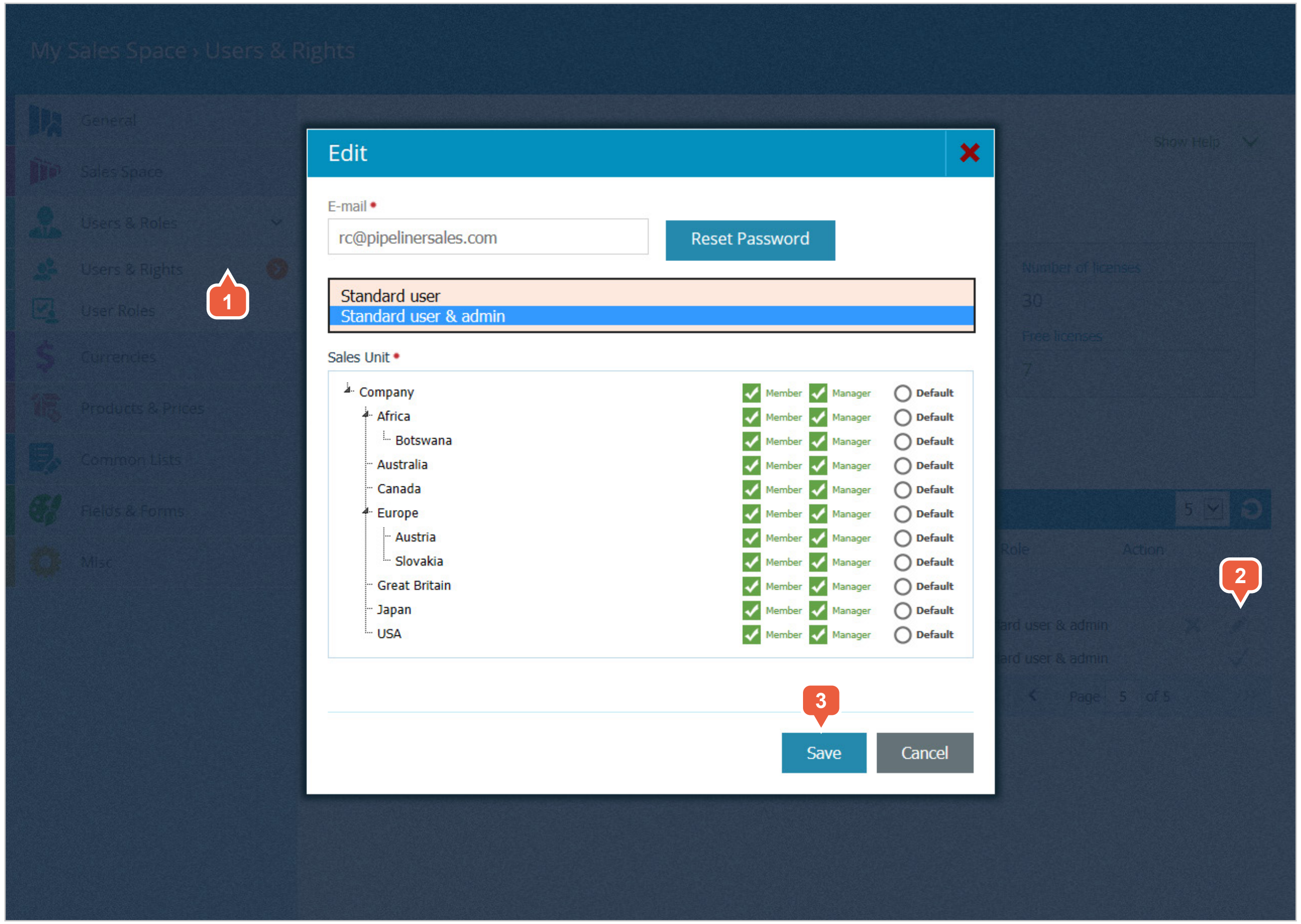


DESCRIPTION

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

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



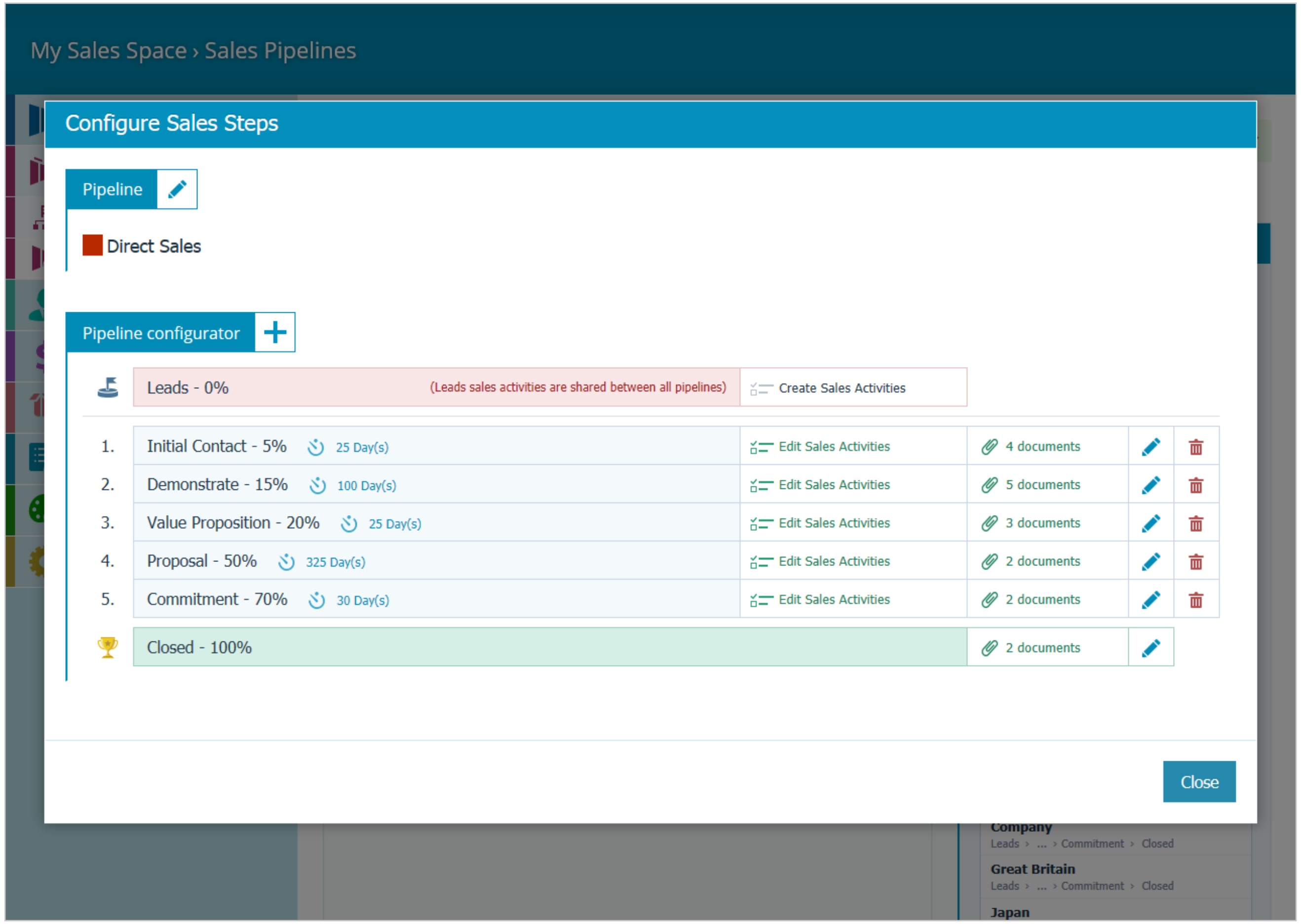
DESCRIPTION

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 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 mutliple Pipelines with different sales process.

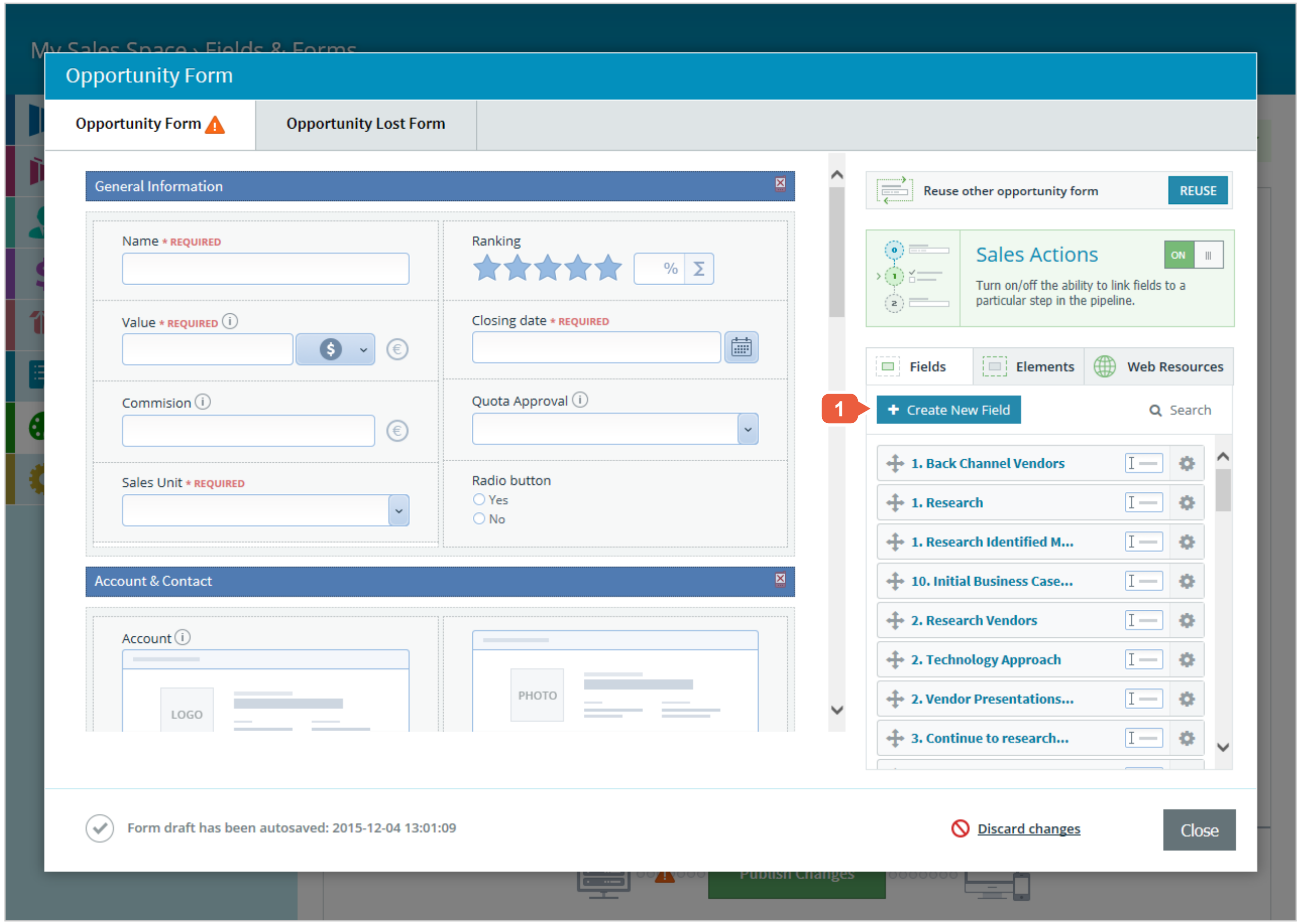


DESCRIPTION

- › 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.

2.2. How do I create Custom Field

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



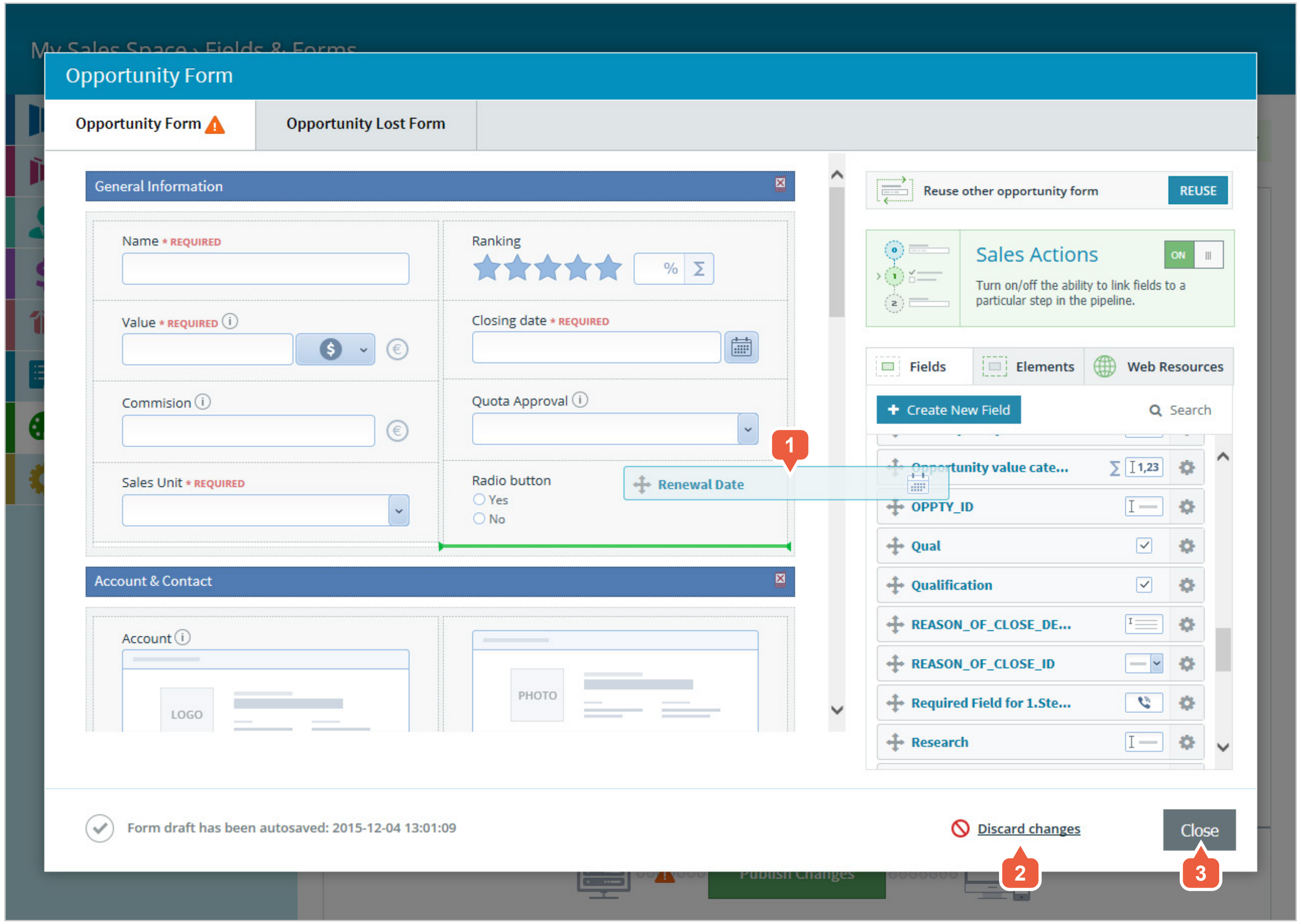
DESCRIPTION

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

Pipeliner 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 Pipeliner application. Click on the FIELDS & FORMS and select the form you want to edit.



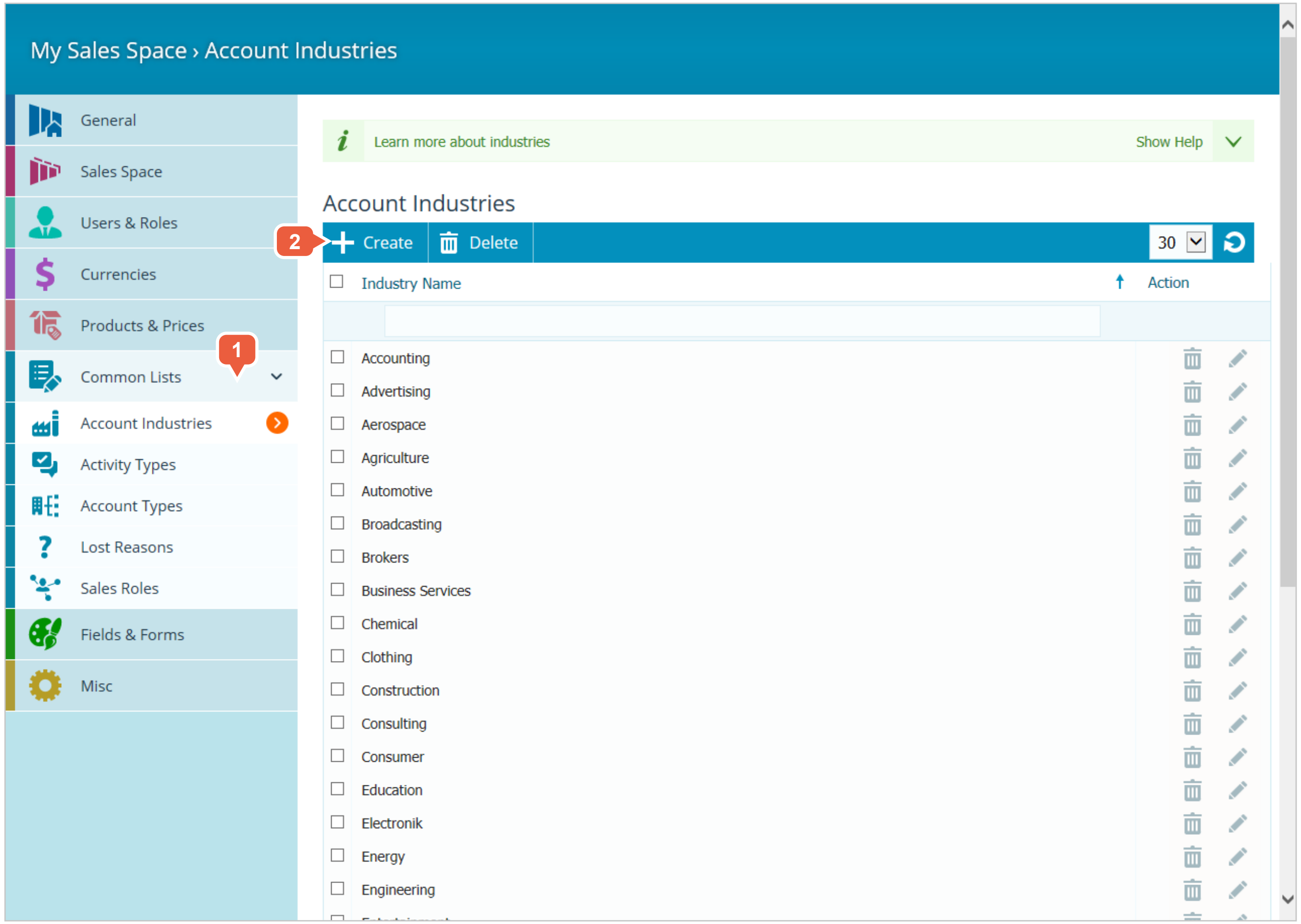
DESCRIPTION

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 Pipeliner you will be able to see all your customization you have done.

2.4. How do I customize Common Lists

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



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.

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