Pipeliner

US Telecom

Johnsons Innovative

BCA Systems Ltd.

CRT Communications

Gama Electronics

Instant Pharma

Isdera

Bavaria Bank

Ltd.

utions Ltd.

Consulting

Weighted Target
$ 2,300,590
58 %

Pipeliner CRM Arithmetica Guide

Getting Started with Pipeliner

Pipeliner

Getting Started with Pipeliner

Learn How to Get Started with Pipeliner Sales CRM Application.

CONTENT

Pipeliner

1. Setting up Pipeliner

1.1. How do I create Pipeliner account

Pipeliner enables you to easily manage your sales activities on your own or within the sales team. The first time you launch the Pipeliner application, you will be prompted to enter your username and password, or create a new Pipeliner account by subscribing to our 30-day Free Trial.

DESCRIPTION

1 Enter required information. Your E-mail will be used as Pipeliner login.

2 Click on the START YOUR FREE TRIAL to create your Pipeliner account and start your 30 days Free Trial.

WEB LINKS:
To register FREE TRIAL account please visit:
www.pipelinersales.com
If you already have an account, please visit www.pipelinersales.com/downloads in order to download Pipeliner.

NOTE: The website will automatically detect what type of computer you are using and provide you with the correct download option.

1.2. How do I set up Sales Pipeline

With Pipeliner you are able to manage your sales activities in visualized sales pipeline. The sales pipeline is your workspace or sales-space where you can create, edit and track all your sales opportunities.

DESCRIPTION

You can edit your sales pipeline in "Administration" by clicking on the PROFILE and select ADMINISTRATION from drop down menu.

1 Within the main menu click on the SALES SPACE and SALES PIPELINES.

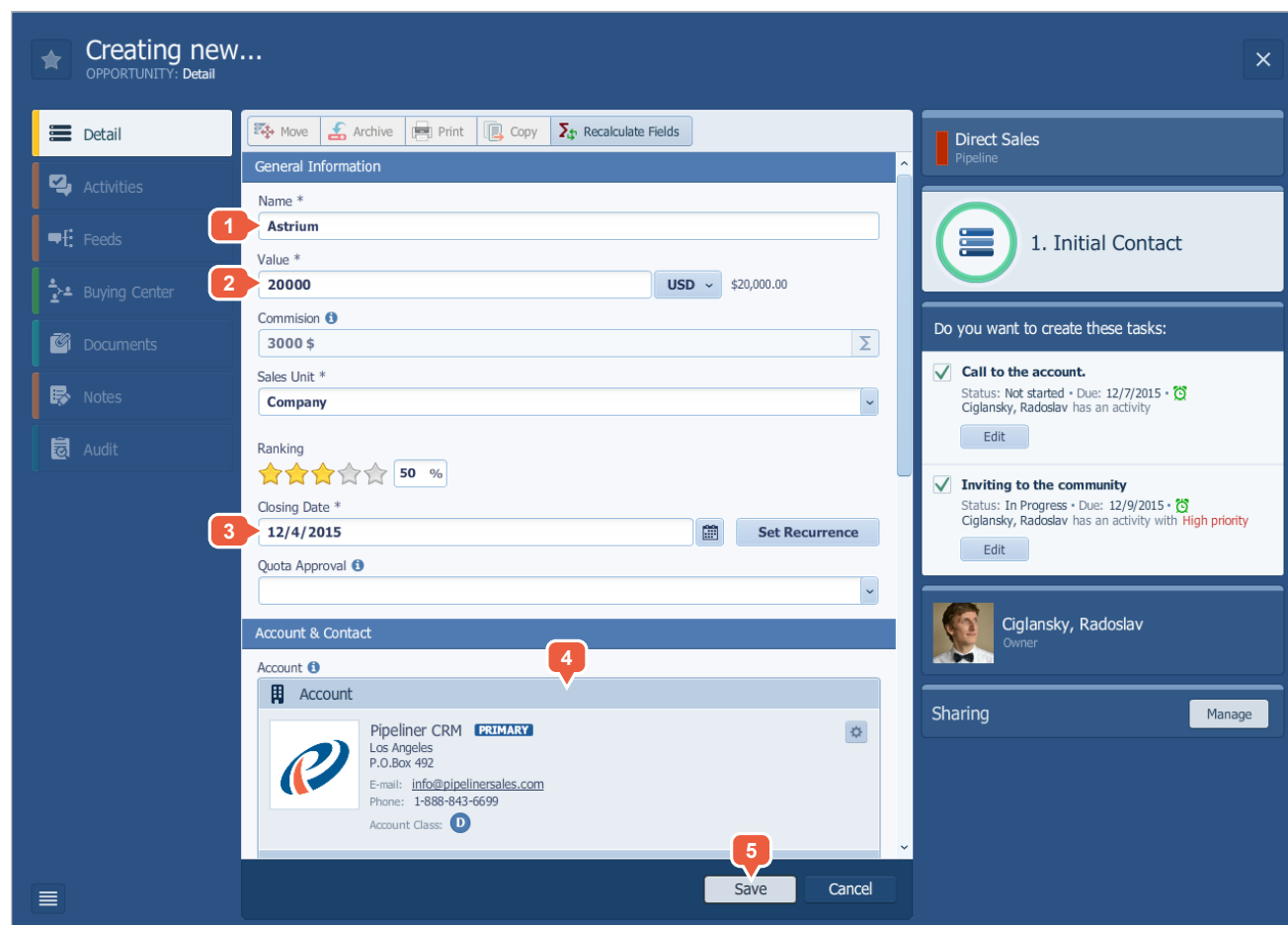**2** Select the Pipeline you want to modify or add a new one.

2. Understanding Pipeliner

2.1. How do I create my first opportunity

Pipeliner enables you to create & track your sales opportunities from their early stage to close. Within the Pipeliner's main menu on the bottom, you can find one large button on the left. If you roll-over this button, you will be able to create opportunity or lead. Click on the opportunity button and Pipeliner will create a brand new opportunity.

DESCRIPTION

1 You can give the opportunity any name you like.

2 Enter the expected opportunity value.

3 Assign the closing date.

4 Relate this opportunity to your customer.

5 Once you finished typing your note, you need to click on the SAVE button and Pipeliner will save and place your opportunity into the first sales step of your pipeline.

TIP: You can also add description, relate the product, share opportunity with your team or rate your opportunity.

Pipeliner

2.2. How do I invite my co-workers

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.

My Sales Space › Users & Rights

General

Sales Space

Users & Roles

Users & Rights **1**

User Roles

Currencies

Products & Prices

Common Lists

Fields & Forms

Misc

i   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 **2**

＋ Invite user(s)   5 ▾ ↻

First Name	Last Name	E-mail	Status	User Role	Action
			All ▾		
		trial2@pipelinersales.co	Active	Standard user	✕ ✎
		trial3@pipelinersales.co	Inactive	Standard user	✓
		trial4@pipelinersales.co	Inactive	Standard user	✓
		trial5@pipelinersales.co	Inactive	Standard user	✓
		alyson.stone@pipeliner:	Inactive	Standard user & admin	✓

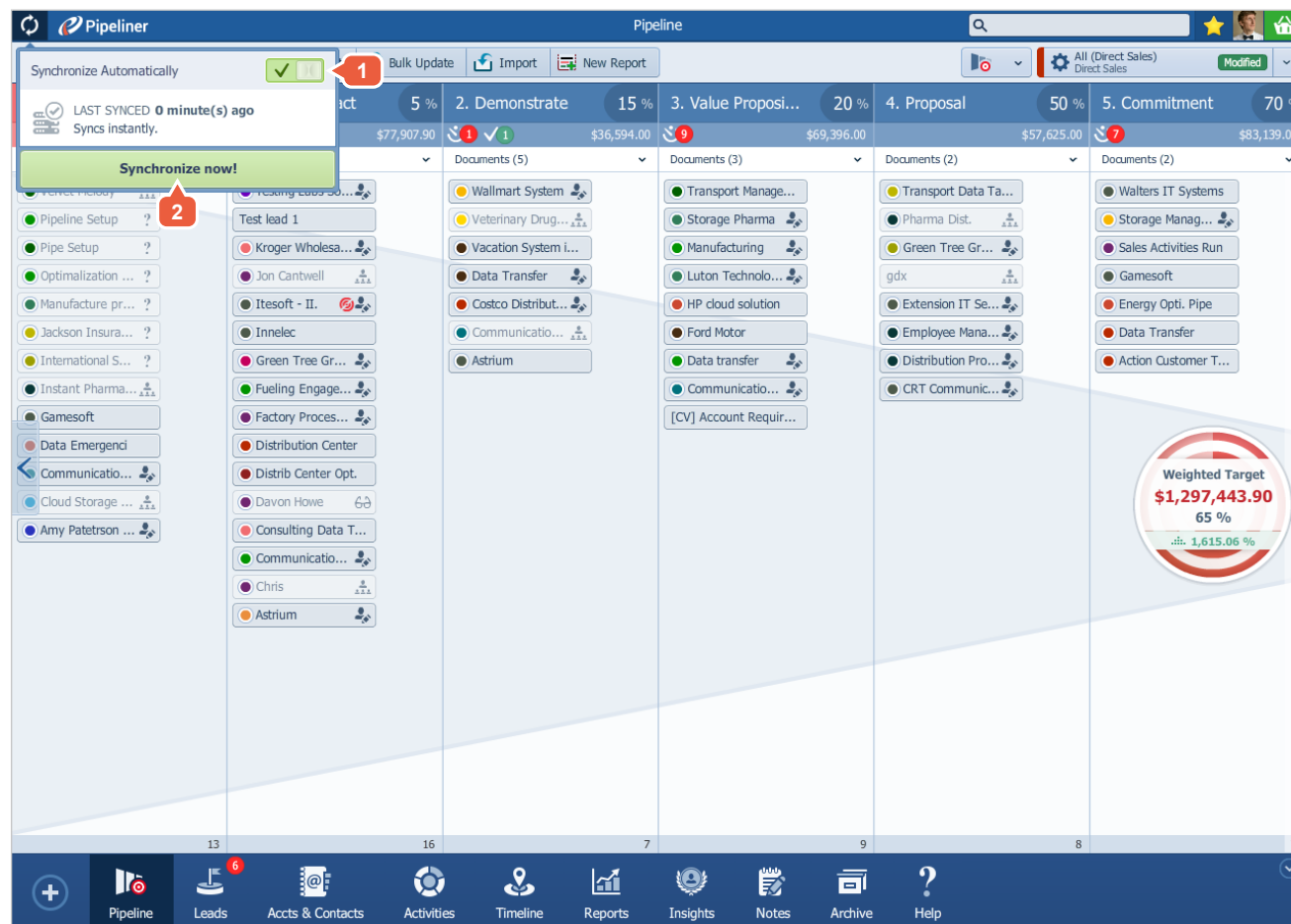View 1 - 5 of 22   « ‹ Page 1 of 5 › »

DESCRIPTION

To invite your co-workers, click on your PROFILE in the top-right side of Pipeliner application and click on the ADMINISTRATION.

1 Within the main menu click on the USERS & ROLES and then USERS & RIGHTS.

2 Click on the INVITE USERS and enter an e-mail to invite your co-workers to join your sales pipeline.

2.3. How do I sync my work

Pipeliner is extremely helpful for managing your sales activities from your desktop on your Windows PC or Mac. But the true power lies in the ability to synchronize your work across all your devices between all your sales team members. Pipeliner enables you to create, share and manage your sales activities on your desktop and synchronize this data with your mobile or tablet and send this data to your co-worker account.

DESCRIPTION

YOU CAN CHOOSE BETWEEN:

1 **Automatic synchronization –** Pipeliner will automatically synchronize all changes by you and other users in your Sales space immediately.

2 **Manual synchronization –** Pipeliner will synchronize data when you press SYNCHRONIZE NOW! button.

Pipeliner

www.pipelinersales.com

Visit us and learn more!