



Pipeliners CRM Arithmetica Guide

Getting Started with Pipeliners



Getting Started with Pipeliner

Learn How to Get Started with Pipeliner Sales CRM Application.


CONTENT

1. Setting up Pipeliner	3
1.1. How do I create Pipeliner account	3
1.2. How do I set up Sales Pipeline	4
2. Understanding Pipeliner	5
2.1. How do I create my first opportunity	5
2.2. How do I invite my co-workers	6
2.3. How do I sync my work	7


1. Setting up Pipelinier

1.1. How do I create Pipelinier account

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



Start Your Free Pipelinier CRM Trial Today!



INCLUDED

Unlimited Access to All Features including Mobile	✓
Full Offline Capability	✓

Please enter your details:

1

Last Name

Email

Password

Company

Phone

Sales People

Language

2 **DOWNLOAD & START YOUR FREE TRIAL**

[Contact us!](#)

DESCRIPTION

- 1 Enter required information. Your E-mail will be used as Pipelinier login.
- 2 Click on the START YOUR FREE TRIAL to create your Pipelinier 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 Pipelinier.



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.

My Sales Space > Sales Pipelines

General

Sales Space

Sales Units

Sales Pipelines **1**

Users & Roles

Currencies

Products & Prices

Common Lists











Fields & Forms

Misc


2 Learn more about sales pipelines management Show Help

Pipelines

+ Add New Pipeline **2**

Pipeline Name	Pipeline Color	Steps	Actions
Customer Success		6 Steps 2	
Direct Sales		6 Steps	
Graphical development		4 Steps	
Lead Development		4 Steps	
New Business Strategies		6 Steps	

Pipeline Name

 Customer Success

Steps (6)

- 1. Introduction - 5%**
No velocity set
- 2. Implementation - 10%**
No velocity set
- 3. Adoption - 25%**
No velocity set
- 4. Account Growth - 80%**
No velocity set
- 5. Renewal - 90%**
No velocity set
- 6. Advocate - 100%**
No velocity set

Assigned Units (2)

Europe
Introduction > ... > Renewal > Advocate

Slovakia
Introduction > ... > Renewal > Advocate

DESCRIPTION

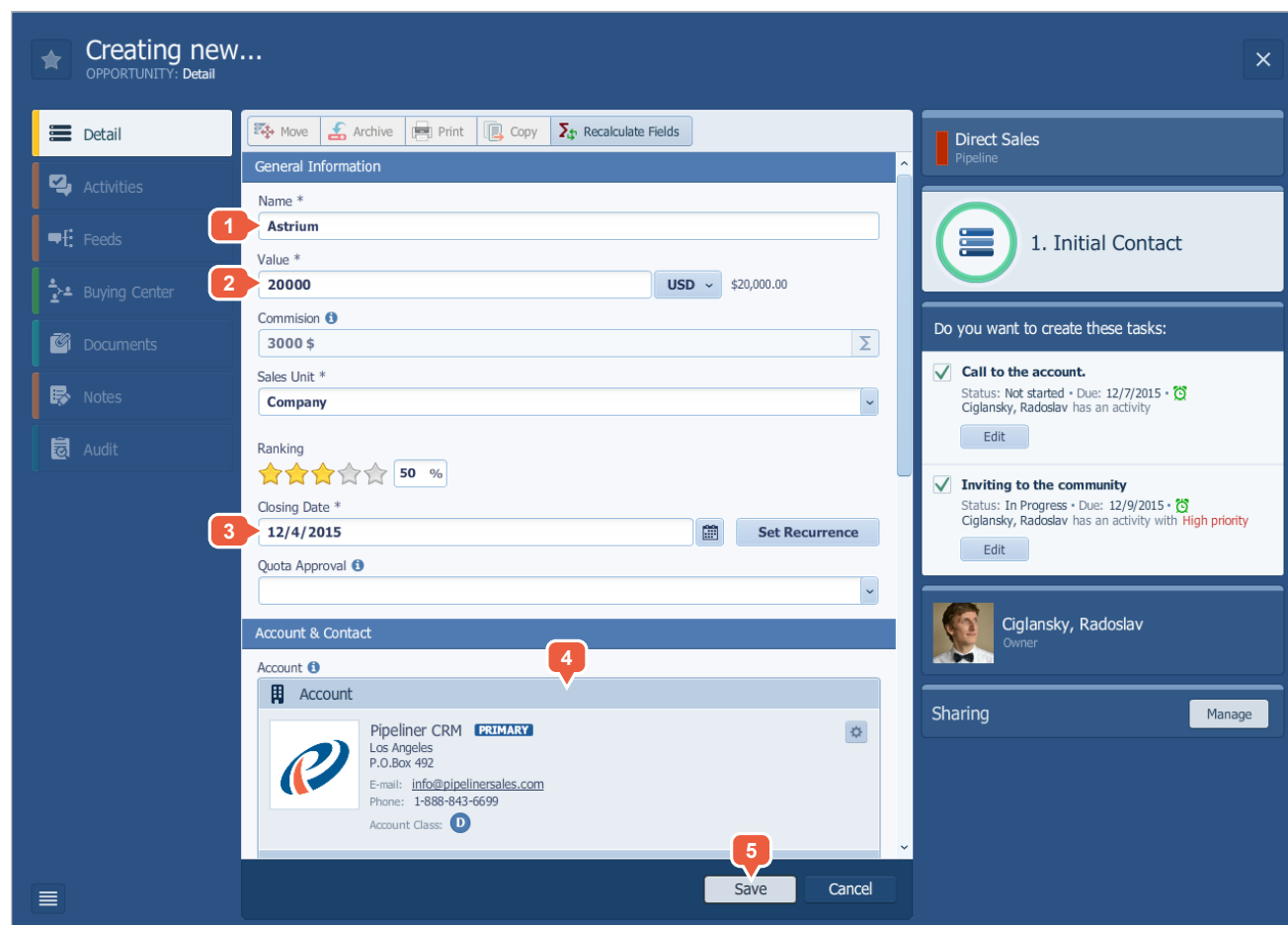
You can edit your sales pipeline in “Administration” by clicking on the PROFILE and select ADMINISTRATION from drop down menu.

- 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 Pipelinier

2.1. How do I create my first opportunity

Pipelinier enables you to create & track your sales opportunities from their early stage to close. Within the Pipelinier'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 Pipelinier will create a brand new opportunity.



Creating new...
OPPORTUNITY: Detail

General Information

1 Name *
Astrium

2 Value *
20000 USD \$20,000.00

Commission ⓘ
3000 \$

Sales Unit *
Company

Ranking
★★★★☆ 50 %

3 Closing Date *
12/4/2015 Set Recurrence

Quota Approval ⓘ

Account & Contact

4 Account ⓘ
Account
Pipelinier CRM PRIMARY
Los Angeles
P.O.Box 492
E-mail: info@pipelinersales.com
Phone: 1-888-843-6699
Account Class: ⓘ

Direct Sales Pipeline

1. Initial Contact

Do you want to create these tasks:

✓ Call to the account.
Status: Not started • Due: 12/7/2015 • Ciglansky, Radoslav has an activity
Edit

✓ Inviting to the community
Status: In Progress • Due: 12/9/2015 • Ciglansky, Radoslav has an activity with High priority
Edit

Ciglansky, Radoslav
Owner

5 Save Cancel

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 Pipelinier 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.

2.2. How do I invite my co-workers

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

[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
			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@pipelinier:	Inactive	Standard user & admin	✓

View 1 - 5 of 22

Page 1 of 5

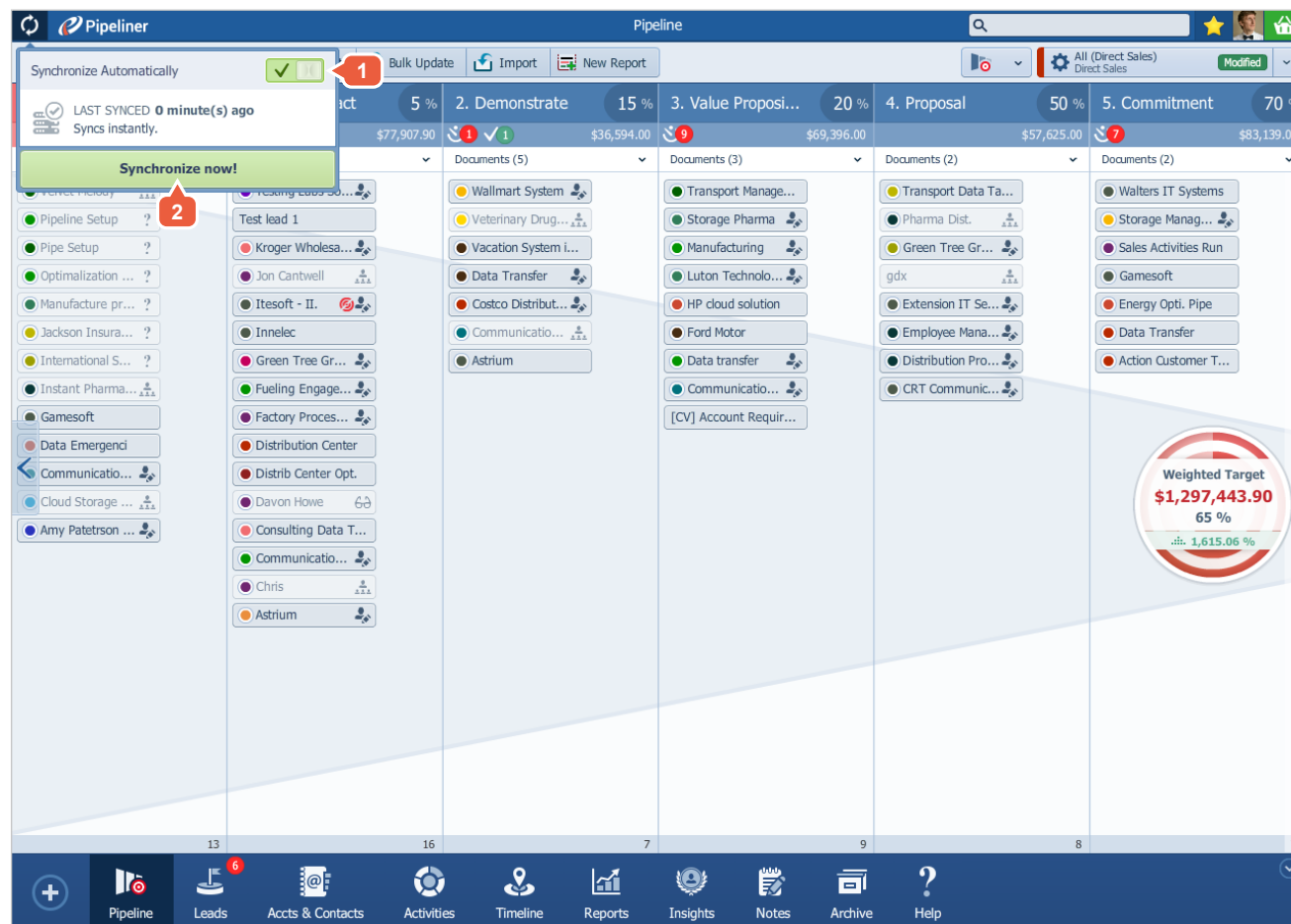
DESCRIPTION

To invite your co-workers, click on your PROFILE in the top-right side of Pipelinier 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

Pipelinier 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. Pipelinier 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.



The screenshot displays the Pipelinier CRM interface. At the top, there's a navigation bar with the Pipelinier logo and a search bar. Below it, a sidebar on the left contains various navigation icons and a list of user accounts. The main area shows a sales pipeline with five stages: 1. Prospect (5%), 2. Demonstrate (15%), 3. Value Proposition (20%), 4. Proposal (50%), and 5. Commitment (70%). Each stage has a list of customer accounts and their associated documents. A 'Synchronize now!' button is highlighted with a red '2' callout. A 'Weighted Target' badge is visible in the bottom right corner, showing a target of \$1,297,443.90 at 65% completion.

DESCRIPTION

YOU CAN CHOOSE BETWEEN:

- 1 **Automatic synchronization** – Pipelinier will automatically synchronize all changes by you and other users in your Sales space immediately.
- 2 **Manual synchronization** – Pipelinier will synchronize data when you press SYNCHRONIZE NOW! button.

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.