



Pipeliners CRM Arithmetica Guide

Importing Leads & Opportunities



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Learn how to import opportunities and leads into Pipeliner Sales CRM Application.

CONTENT

1. Creating and understanding CSV Files	3
1.1. How do I create CSV File	3
1.2. How do I check CSV Configuration	4
2. Uploading and importing Opportunities or Leads	5
2.1. How do I upload my CSV	5
2.2. Import Wizard – Part 1: CSV Configuration	6
2.3. Import Wizard – Part 2: Fields Mapping	7
2.4. Import Wizard – Part 3: Opportunities or Leads Validating	8

1. Creating and understanding CSV Files

1.1. How do I create CSV File

CSV Import is the most commonly used method for getting your data sets into Pipeliner. CSV is a common, relatively simple file format that is widely supported by consumer, business, and scientific applications. CSV stands for Comma Separated Values.

MS EXCEL (WINDOWS)

Follow the steps below to create CSV file in MS Excel for Windows:

Step 1:

After you have opened/created your spreadsheet, click on the FILE button in the top left and click on SAVE AS.

Step 2:

In the SAVE AS window that appears, at the bottom you will need to open the drop-down menu titled SAVE AS TYPE and scroll down till you can select csv (ms-dos) (*.csv).

Step 3:

You can change now the File name and the location where you will save the file. When everything is set, click SAVE in the bottom right.

Step 4:

You will receive a warning that your workbook contains multiple sheets. Click on OK to continue.

Step 5:

Finally, you will receive a warning about features not being compatible. Click on YES to finish saving your file.

MS EXCEL (MAC)

Follow the steps below to create CSV file in MS Excel for OS X:

Step 1:

After you have opened/created your spreadsheet, select FILE › SAVE AS from the Menu Bar.

Step 2:

In the window that appears, select the dropdown menu FORMAT and select Comma Separated Values (.csv) from the list.

Step 3:

You can change the file name (under SAVE AS) or the location where you will save the file. When everything is ok, click SAVE in the bottom right.

IWORK (MAC)

Follow the steps below to create CSV file in iWork for OS X:

Step 1:

After you have opened/created your spreadsheet, select FILE › EXPORT from the Menu Bar.

Step 2:

At the top of the new window that appears, please select the csv box at the very top, select the TEXT ENCODING drop-down menu and choose Unicode (UTF-8).

Step 3:

Click NEXT to bring up the final window where you can change the name of the file (SAVE AS) and the location where to save the file. Click EXPORT when ready.

1.2. How do I check CSV Configuration

Before you start importing your data into Pipelinier you need to review your CSV file formatting in order to avoid any errors and to ensure that your data is imported correctly.

WINDOWS

Follow the steps below to check CSV configuration in Windows:

- › **Step 1:** Open **Notepad**.
- › **Step 2:** Click **FILE**.
- › **Step 3:** Click **OPEN** and select your .csv file.
- › **Step 4:** Please check if all your columns contain headers; if there is any enclosure used; and what separator do you use – the enclosure is needed to prevent the program to use all separators by default.
- › **Step 5:** After the check is done please save the changes you have made and you are ready to import it to Pipelinier.

MAC

Follow the steps below to check CSV configuration in OS X:

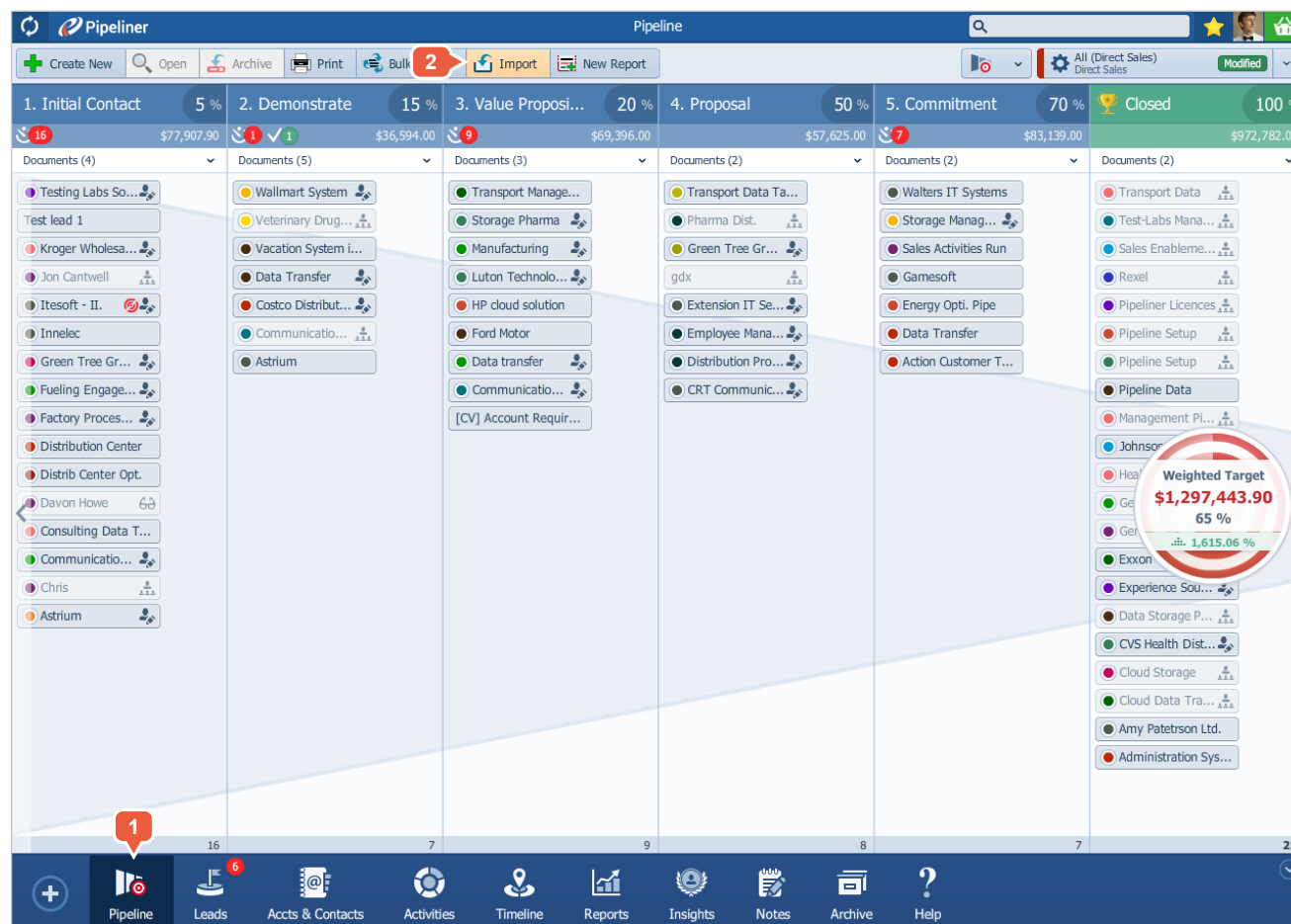
- › **Step 1:** Open **Textedit**.
- › **Step 2:** Click **FILE**.
- › **Step 3:** Click **OPEN** and select your .csv file.
- › **Step 4:** Please check if all your columns contain headers; if there is any enclosure used; and what separator do you use – the enclosure is needed to prevent the program to use all separators by default.
- › **Step 5:** After the check is done please save the changes you have made and you are ready to import it to Pipelinier.

OPTION	DESCRIPTION
Charset encoding	Select the way how a computer interprets and then displays a file as text.
Enclosure	Select the way how are words separated in csv file e.g. quota, i.e. computer will according to it distinguish different words.
Separator	Select the way how two different columns are separated in csv file e.g. with coma, e.g. computer will distinguish two columns according to it.
Columns contain headers	Check this option if columns contain headers for data within one column.

2. Uploading and importing Opportunities or Leads

2.1. How do I upload my CSV

Pipeliner can import your opportunities or leads with breeze. Once you have created your CSV file you can upload it into Pipeliner Import Wizard.



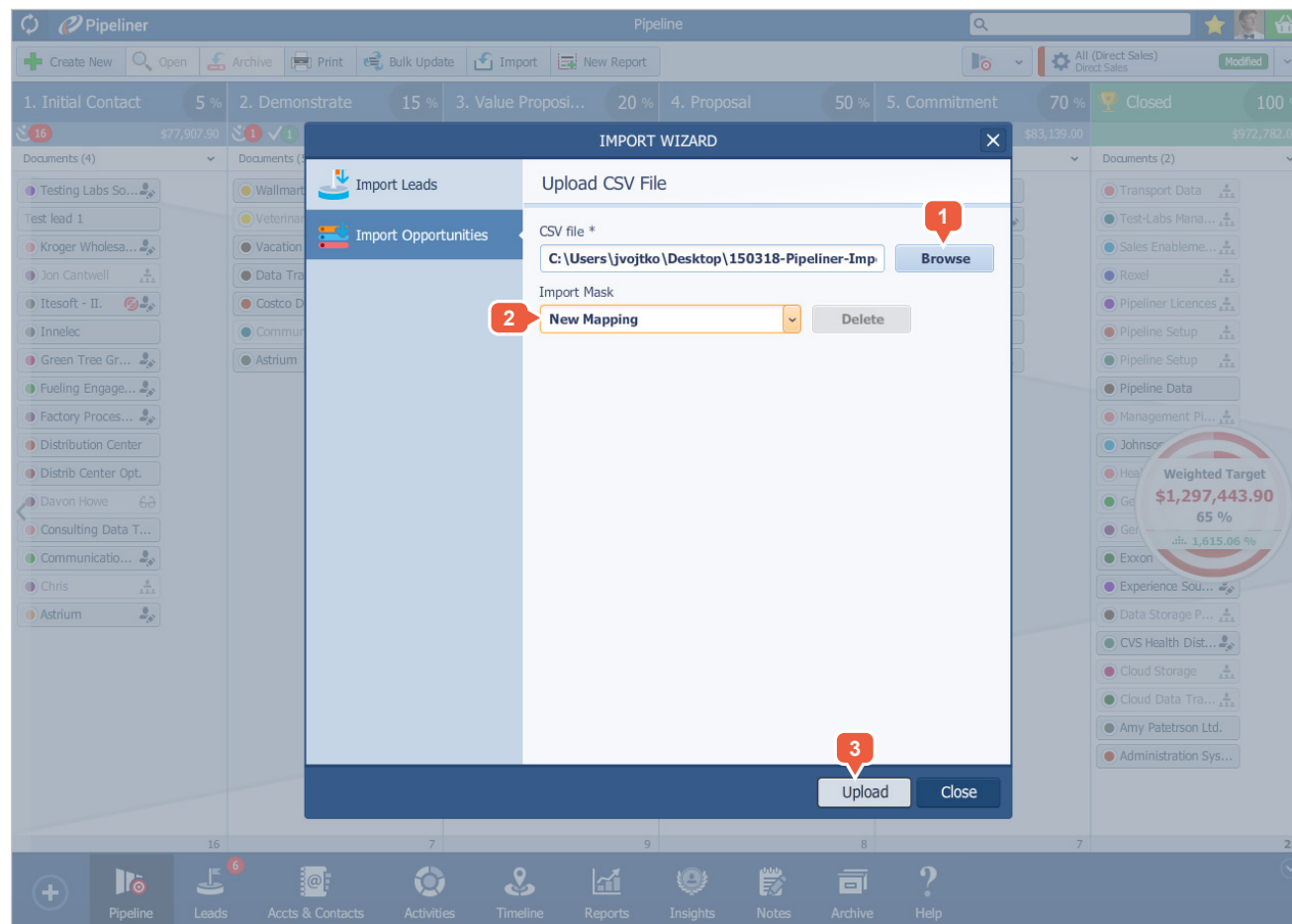
The screenshot displays the Pipeliner CRM interface. At the top, the 'Import' button is highlighted with a red '2' callout. The main area shows a sales pipeline with stages: 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), 5. Commitment (70%), and Closed (100%). Each stage has a list of documents. A red '1' callout points to the 'Pipeline' menu item in the bottom navigation bar. A circular callout on the right shows a 'Weighted Target' of \$1,297,443.90 at 65% completion.

DESCRIPTION

- 1 To import your opportunities or leads into Pipeliner you will need to click on the PIPELINE within the main Pipeliner menu.
- 2 Pipeliner will open SALES PIPELINE. Within its main menu click on the IMPORT.

2.2. Import Wizard – Part 1: CSV Configuration

CSV file formatting is the most important configuration during opportunity or lead import. Please be sure that you know your CSV formatting before importing csv files.

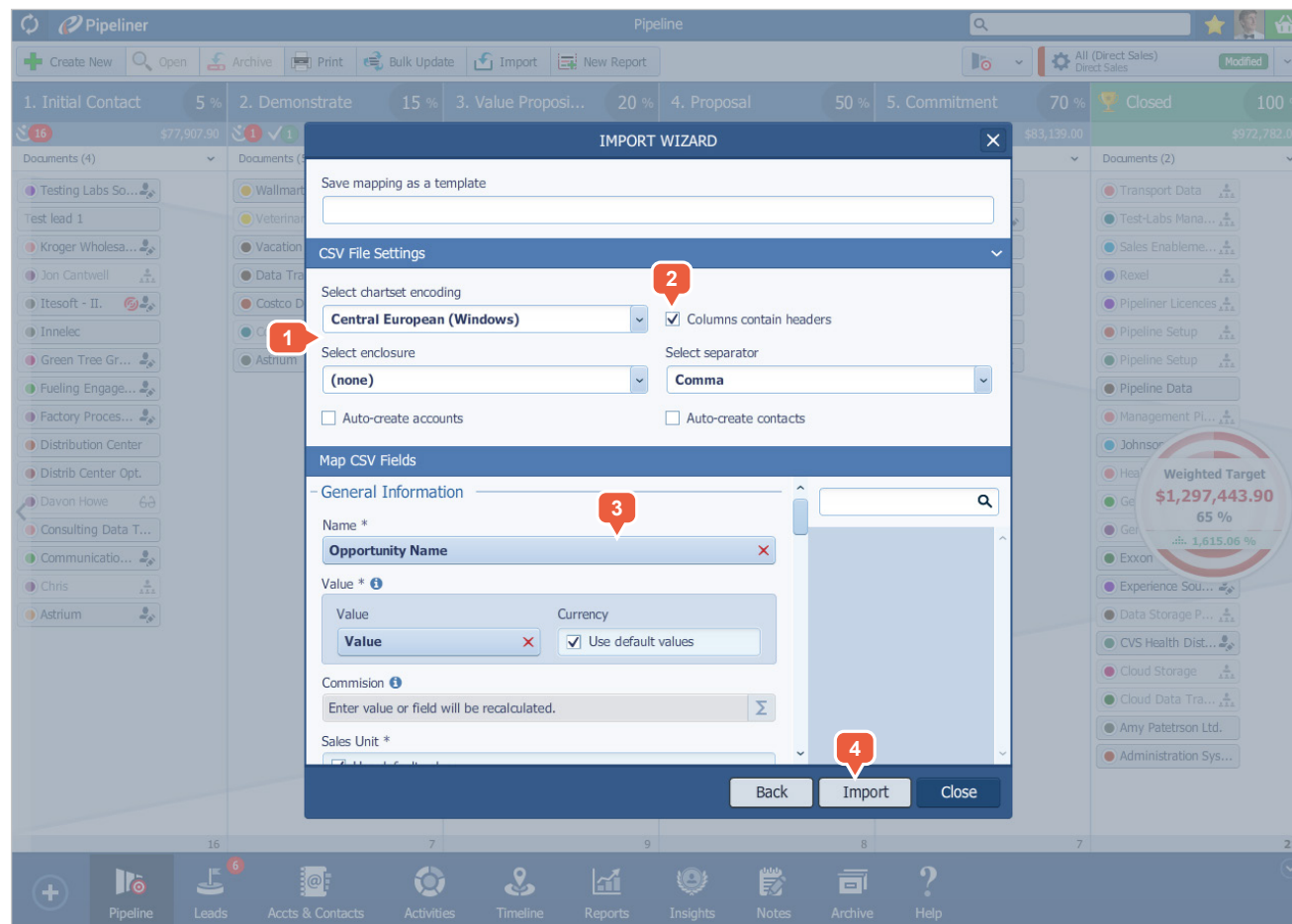


DESCRIPTION

- 1 To upload csv file, you will need to click on the BROWSE button. Localize your CSV file and click OPEN.
- 2 Select the import mask. Default import mask maps the fields from your CSV file automatically. New mapping lets you map your fields CSV file to the fields in Pipeliner.
- 3 Once you're done configuring the CSV file, click on the UPLOAD button to continue.

2.3. Import Wizard – Part 2: Fields Mapping

Here you link all your CSV file columns with Pipelinier fields.



IMPORT WIZARD

Save mapping as a template

CSV File Settings

Select chartset encoding: **Central European (Windows)** (1)

☒ Columns contain headers (2)

Select enclosure: **(none)**

Select separator: **Comma**

☐ Auto-create accounts

☐ Auto-create contacts

Map CSV Fields

General Information (3)

Name *: **Opportunity Name**

Value * (4)

Value: **Value**

Currency: ☒ Use default values

Commission: Enter value or field will be recalculated.

Sales Unit *

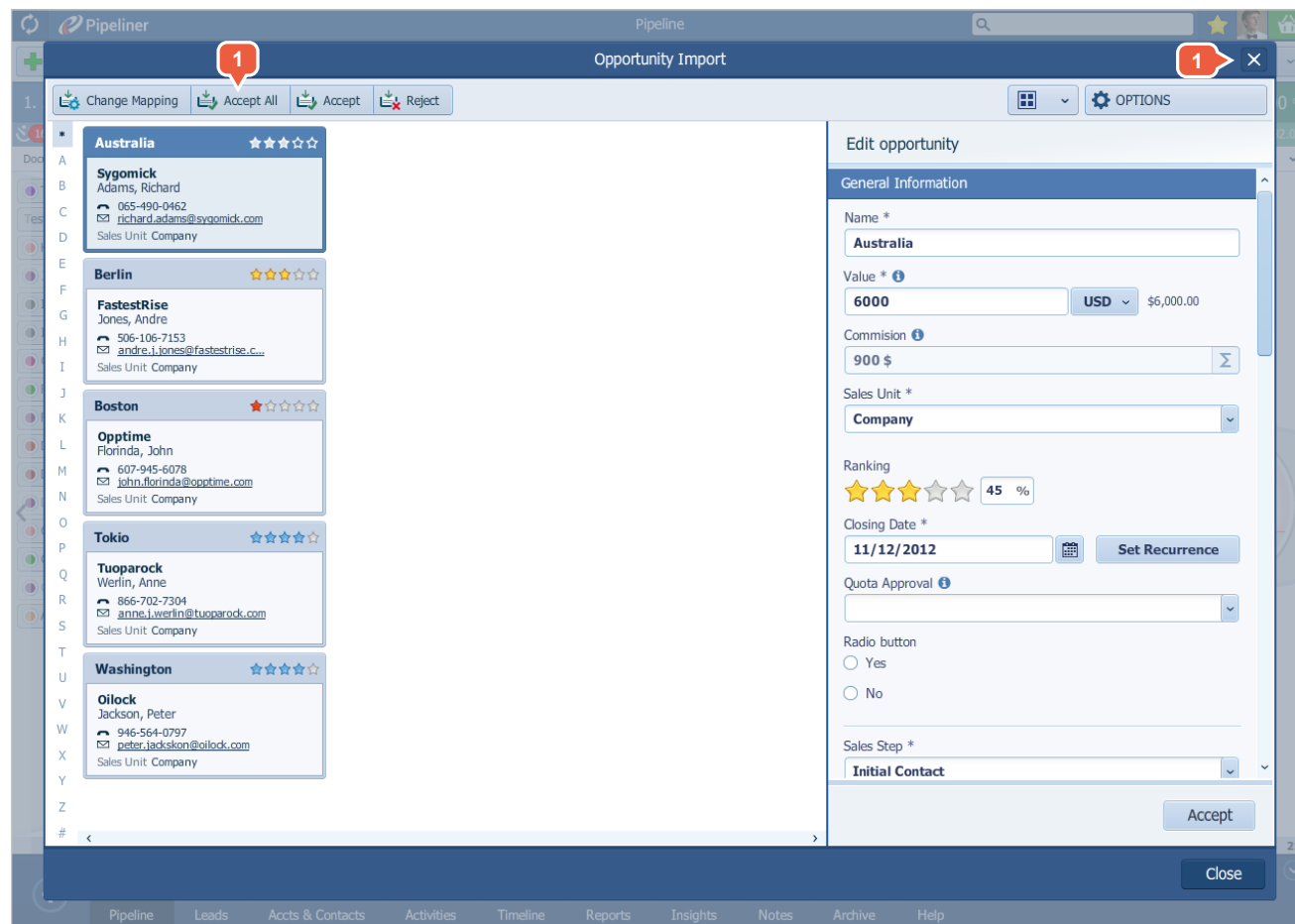
Back Import Close

DESCRIPTION

- 1 Define chartset encoding, separator and enclosure.
- 2 Check the box COLUMNS CONTAIN HEADERS if your columns have their special names.
- 3 Drag one of the columns from the column list and drop it on the field to which you wish to create a link.
- 4 Once you're done mapping the CSV file with pipelinier fields, click on the IMPORT button to continue.

2.4. Import Wizard – Part 3: Opportunities or Leads Validating

After successful import mapping, the system will open a CSV Import panel with all the imported data. This panel is only a temporary panel i.e. you have to accept all the opportunities or leads you really want before closing it.



The screenshot shows the 'Opportunity Import' panel in the Pipelinier CRM. The left sidebar lists imported opportunities grouped by location: Australia (Sygomick), Berlin (FastestRise), Boston (Opptime), Tokio (Tuoparock), and Washington (Oilock). The main area displays the 'Edit opportunity' form for the selected entry. The form includes fields for Name, Value, Commission, Sales Unit, Ranking, Closing Date, Quota Approval, Radio button, and Sales Step. A red '1' in a speech bubble points to the 'Accept All' button in the top left of the panel.

DESCRIPTION

- 1 › Once you're done validating the imported opportunities or leads, click on the CLOSE button to finish import process.
- › Click on ACCEPT ALL to accept all Accounts or Contacts at once.

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