Pipeliner CRM Arithmetica Guide

Lead Management

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Lead Management

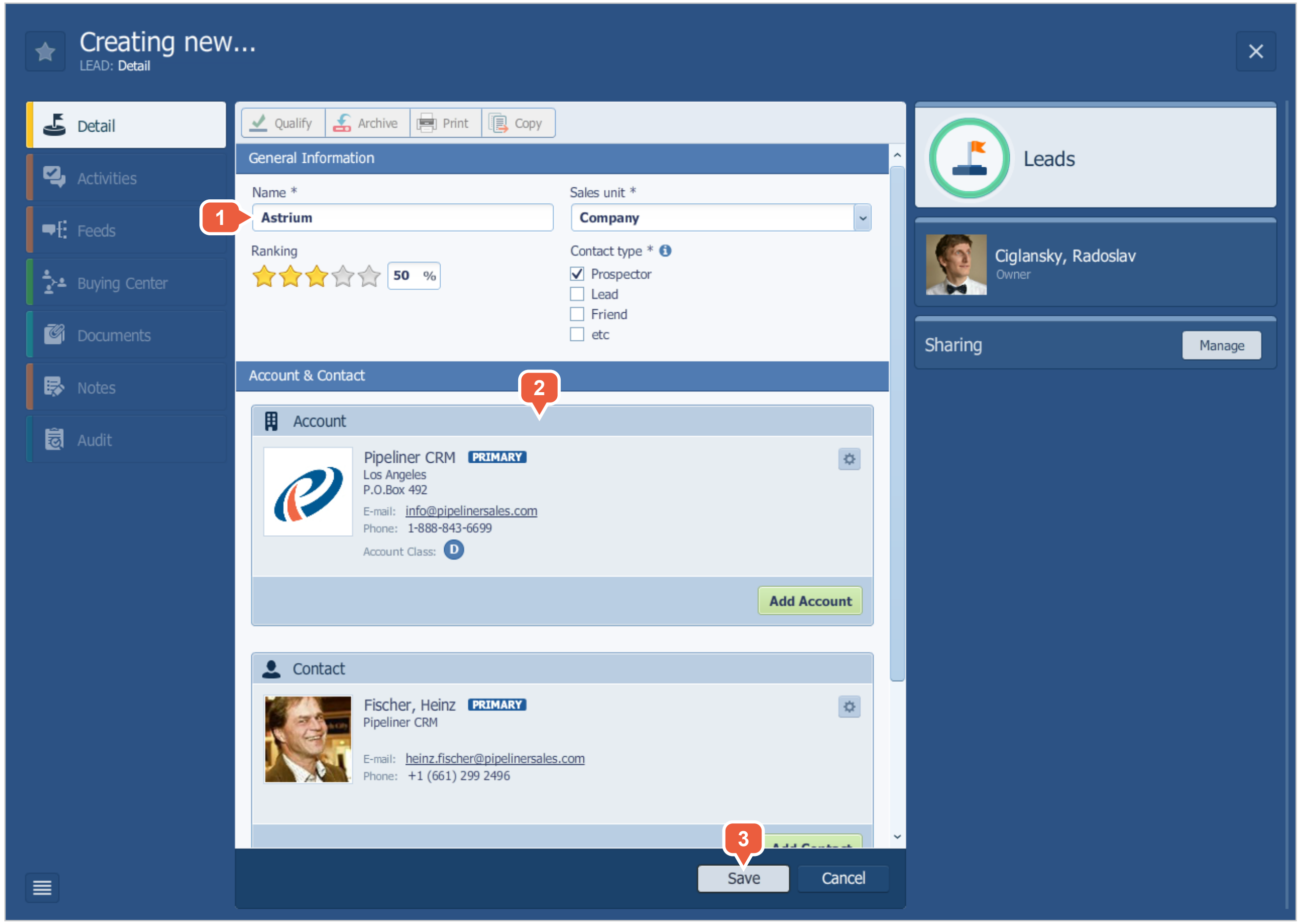
Learn how to use sales lead management with Pipeliner Sales CRM Application.

CONTENT

1. Creating and sharing the Sales Lead

1.1. How do I create new Lead

Pipeliner enables you to always have your newest leads within the Pipeliner application on a daily basis. Lead is an unqualified opportunity i.e. potential customer with a high possibility to proceed to the sales pipeline. Click on the CREATE NEW button and Pipeliner will create a brand new lead for you.



DESCRIPTION

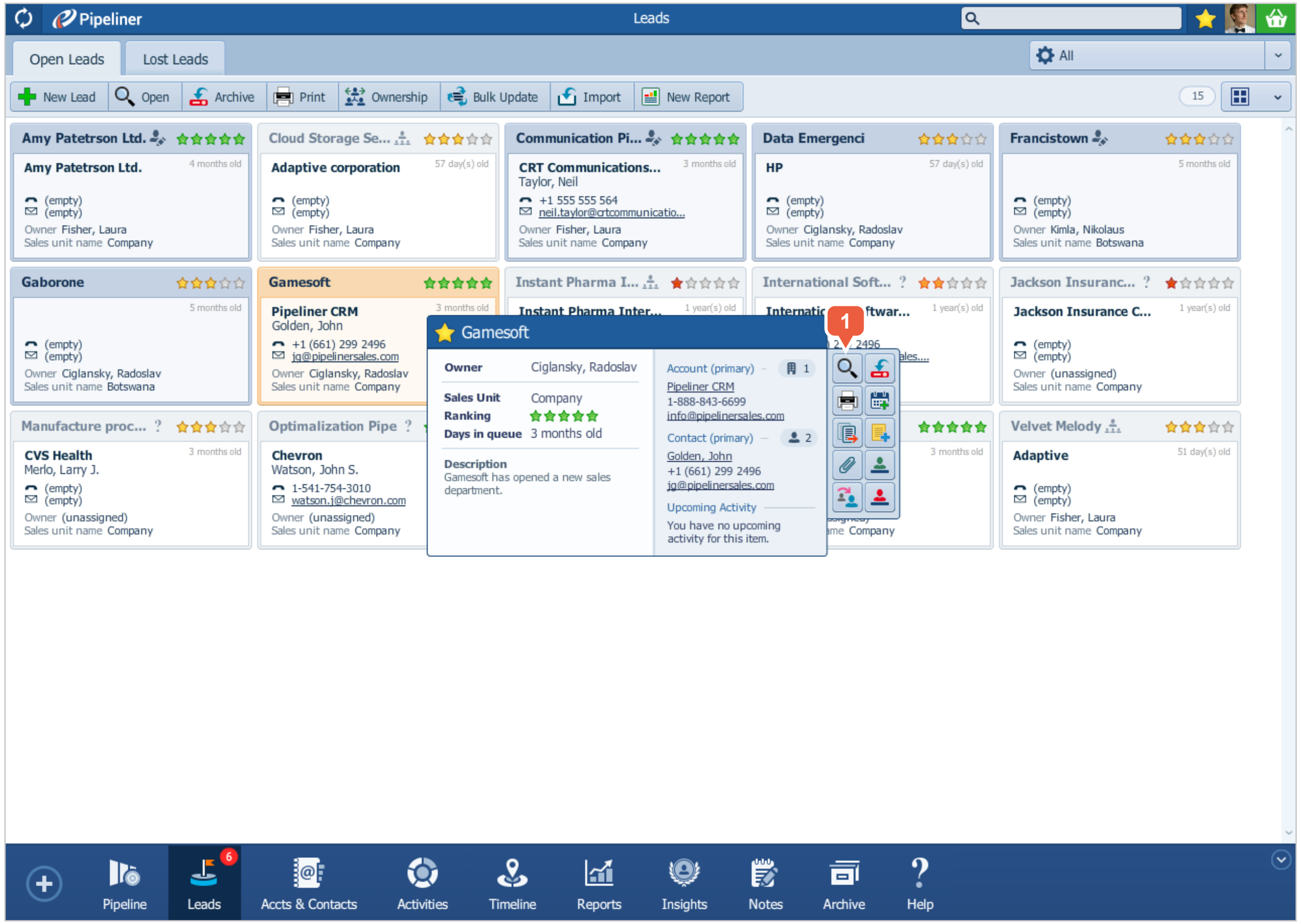
1. You can give to lead any name you like.
2. Relate this lead to your customer.
3. Once you finished typing your lead, you need to click on the SAVE button and Pipeliner will save and place your lead into the lead list of your sales pipeline.

TIP: You can also add description, share lead with your team or rate your lead.

NOTE: Leads are shared across all of your Pipelines.

1.2. How do I edit my Lead

Once you start to work on your leads you will need to update its data on daily basis.



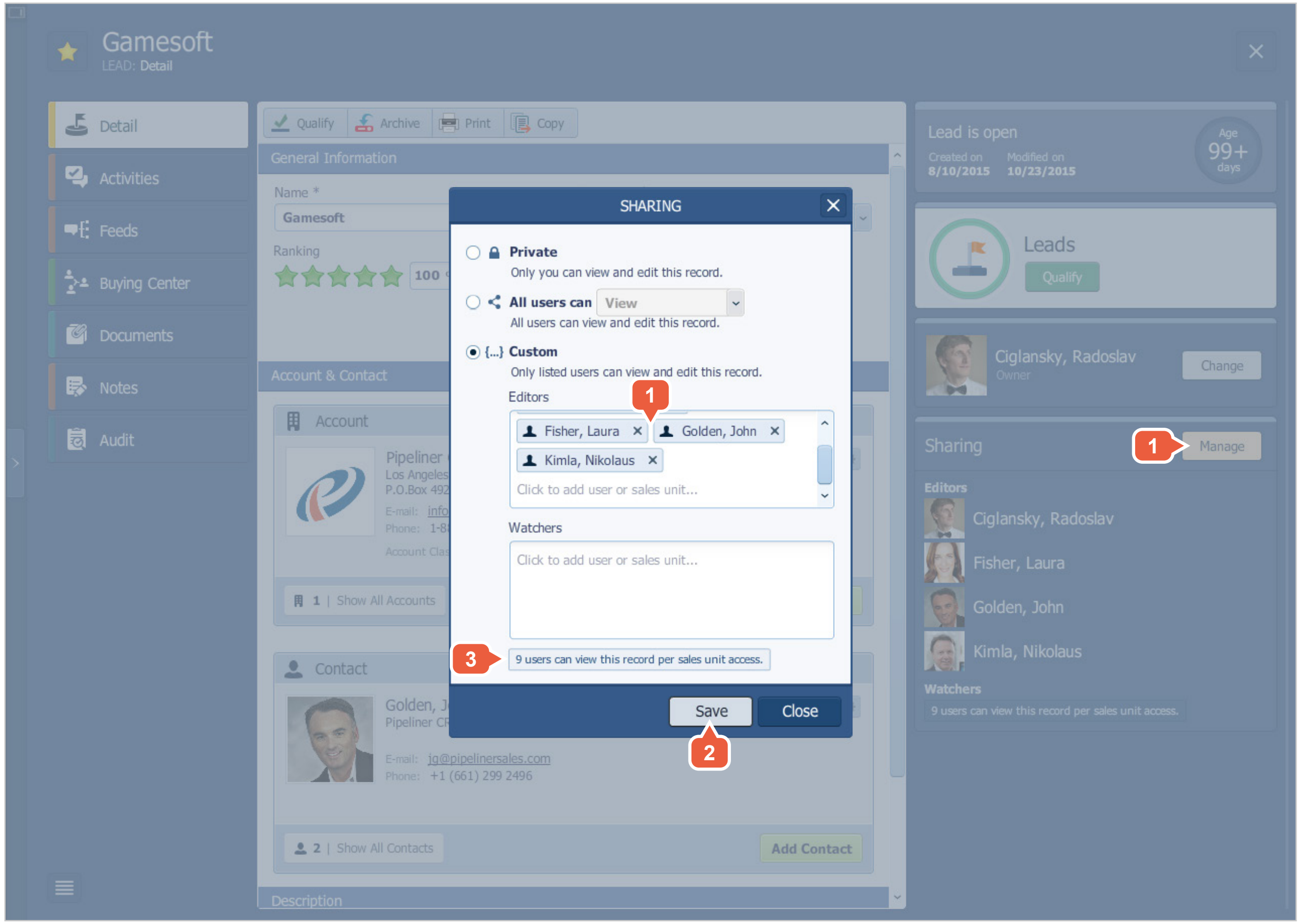
DESCRIPTION

1

- In order to edit your lead please roll-over the lead and click on the OPEN icon. Pipeliner opens for you lead panel with all its related details.
- Once you finished editing your lead, you need to click on the SAVE button and Pipeliner will save all your changes.

1.3. How do I share my Lead

Pipeliner enables you to share your leads with your sales team. You can assign either editors or watchers to your lead. Editor can edit the lead's details and watcher can only see this lead in his lead list. In order to share your lead please double click on the lead. Pipeliner opens for you lead panel with all its related details.



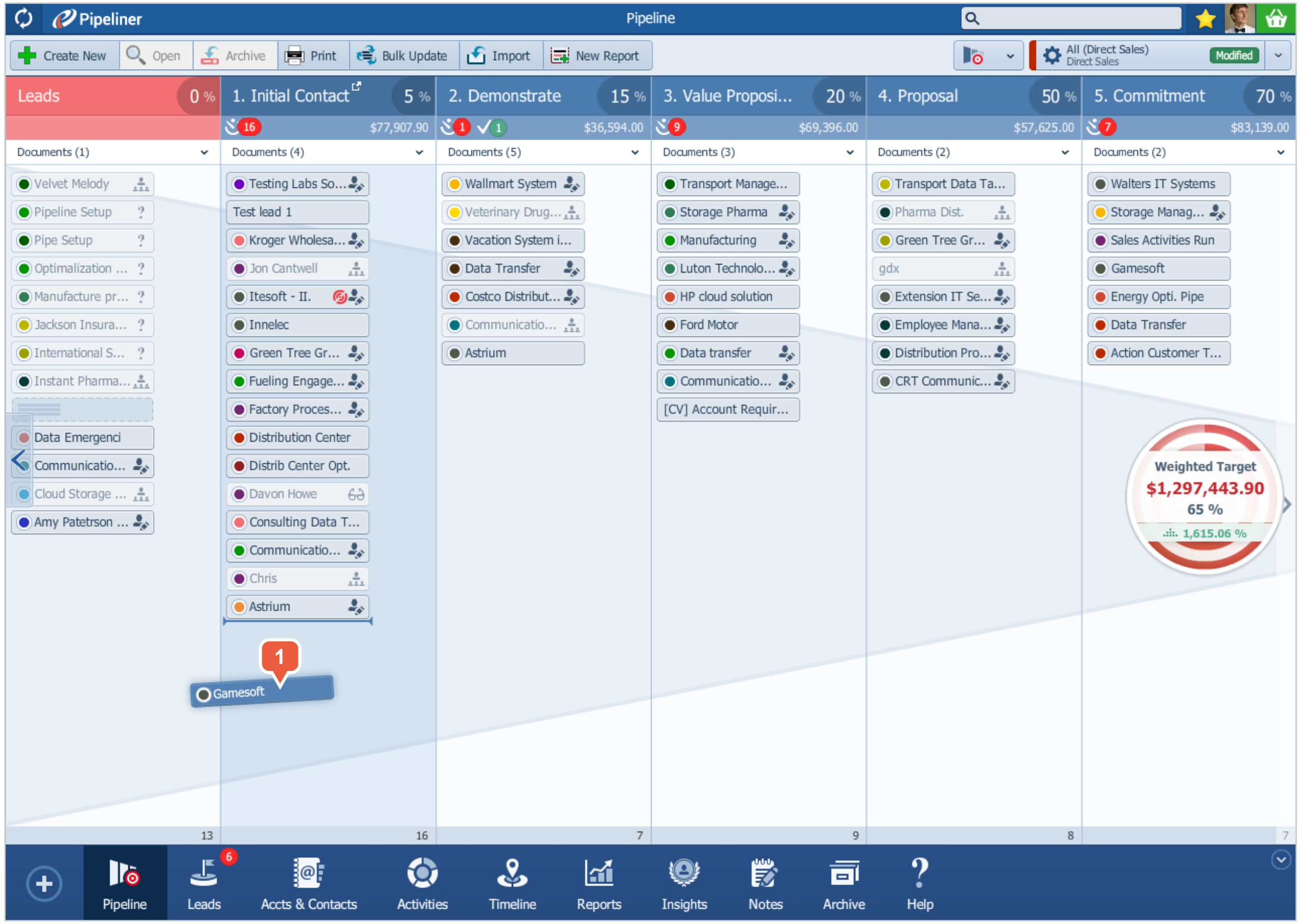
DESCRIPTION

1. Click on the MANAGE button within the Sharing menu and start entering the name of your co-worker into Editors or Watchers box. Pipeliner will automatically complete the name for you if the user exists in your team.
2. Once you finished sharing your lead, you need to click on the SAVE button and Pipeliner will save all your changes.
3. Number of users with watcher rights based on the Manager rights for Sales unit selected.

2. Qualifying and closing the Sales Lead

2.1. How do I qualify Lead to an Opportunity

Pipeliner power lies in its ability to easy and quickly move your leads and opportunities across your selling process. If your potential customer has decided to accept your offer you can qualify it into real sales opportunity. Lead qualification is a process of qualifying lead into the sales opportunity.



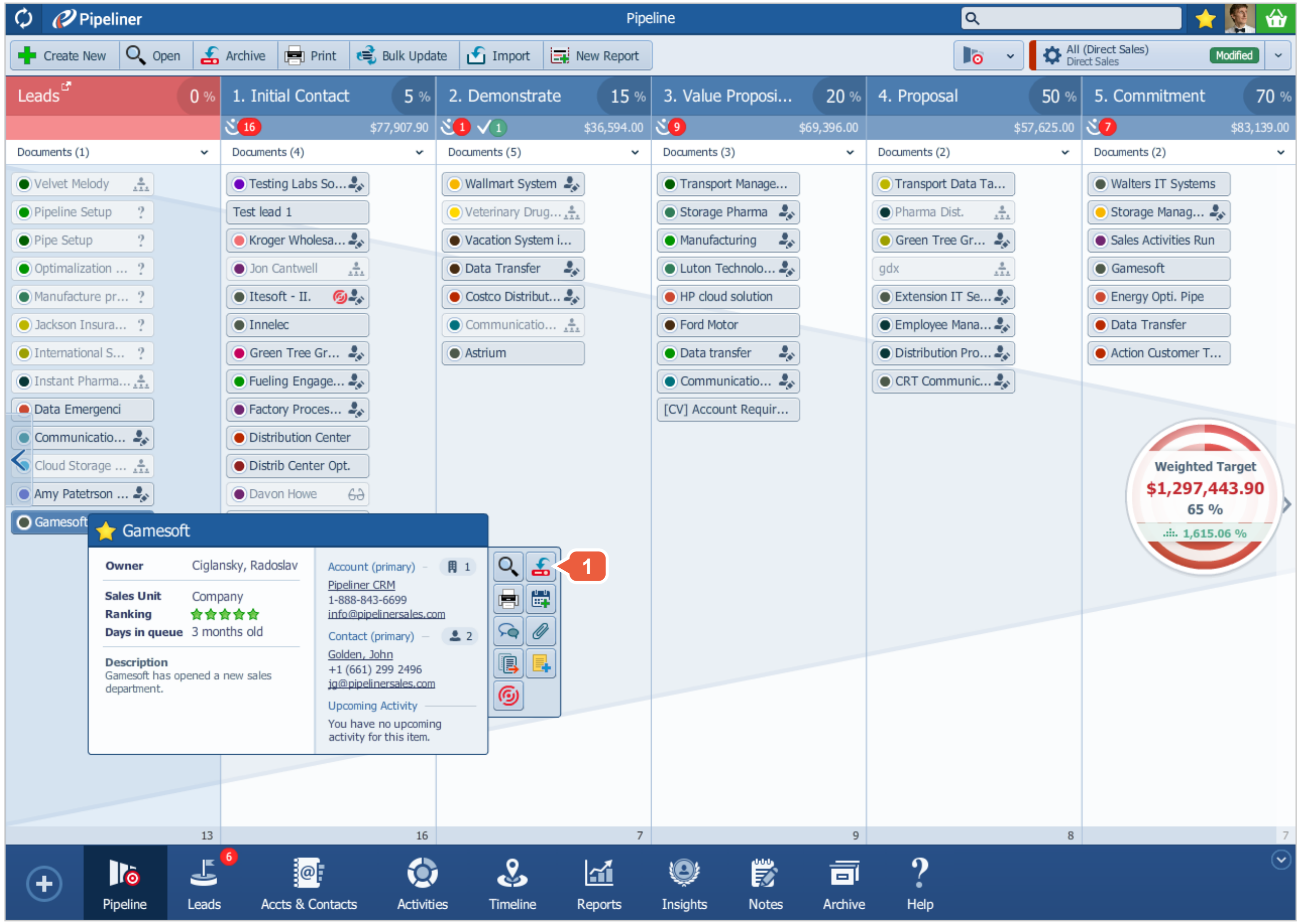
DESCRIPTION

1 In order to qualify lead into sales opportunity or move lead from your lead list into sales pipeline, you need to drag and drop it from the lead list to any sales step of your sales pipeline.

TIP: Opportunity will be created in current Pipeline. You can move it to different Sales Pipeline by editing its Detail.

2.2. How do I disqualify Lead (move Lead into Archive)

According to the 80-20 rule almost 80% of your leads will not convert into real sales opportunity. Pipeliner enables you to easily disqualify lead into archive and track all reasons to closing lost leads.

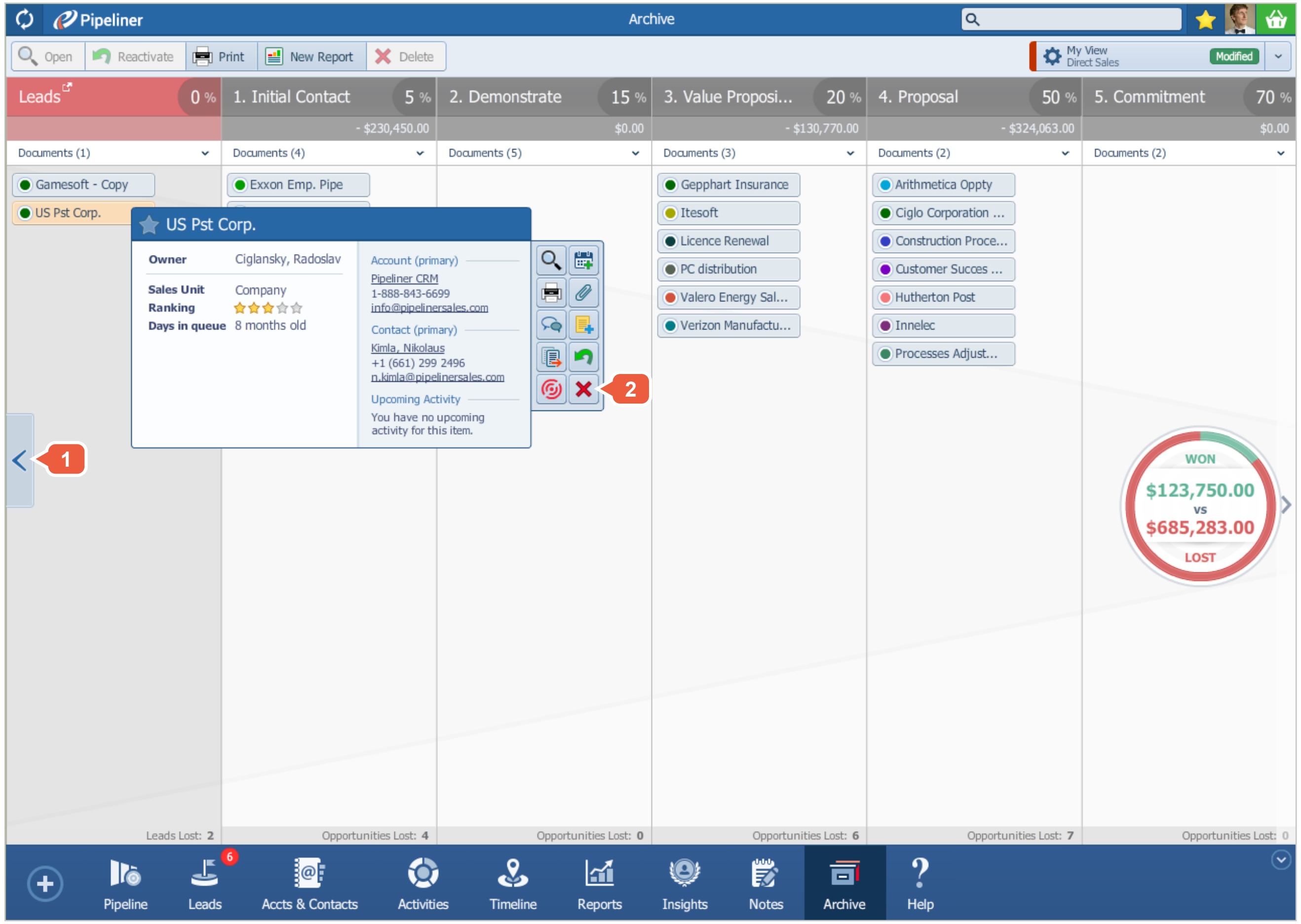


DESCRIPTION

1
- In order to send disqualified lead into archive roll-over the lead. Pipeliner will show you the lead extract with all its related tools.
- Within the tools list click on the icon MOVE TO ARCHIVE.
- Pipeliner will save and place your lost lead into the lead list of your sales pipeline archive.

2.3. How do I delete Lead from Archive

If you decide not to archive your any of your lead or you think that a particular lead does not meet your minimal requirements e.g. the lead is bogus, you can delete it from archive forever. In order to delete lead from your archive click on the ARCHIVE icon within the Pipeliner menu.



DESCRIPTION

1
- Click on the OPEN LEAD PANEL button.
- Find the lead you would like to delete and roll-over the lead. Pipeliner will show you the lead extract with all its related tools.

2
- Within the tools list click on the icon DELETE FOREVER.
- Once you finished deleting your lead, you need to click on the SAVE button and Pipeliner will remove this lead from your database.

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