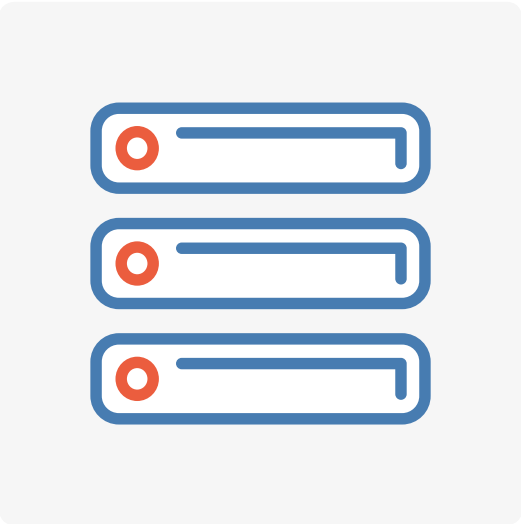




Pipeliner CRM Arithmetica Guide

Opportunity Management



Opportunity Management

Learn how to manage sales opportunities with Pipeliner Sales CRM Application.

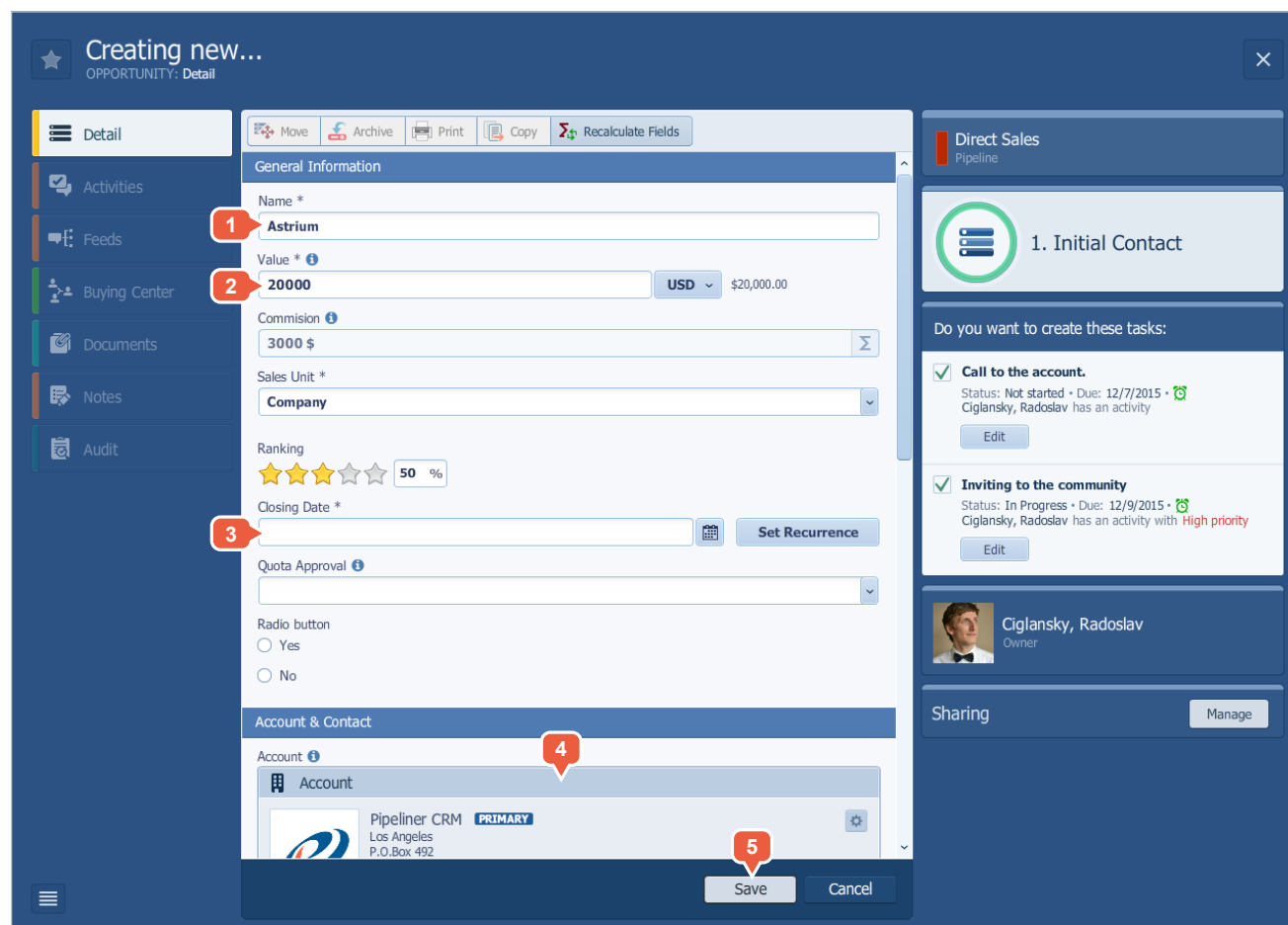
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1. Creating and sharing the Sales Opportunity

1.1. How do I create new Opportunity

Pipelinier enables you to create and track your sales opportunities from their early stage to close. Within the Pipelinier's main menu on the bottom of application you can find one large button on the left side. If you roll-over this button, you will be able to create either opportunity or lead.



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 *
Set Recurrence

Quota Approval *

Radio button
☐ Yes
☐ No

Account & Contact

4. Account
Pipelinier CRM PRIMARY
Los Angeles
P.O.Box 492

5. Save Cancel

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

Sharing Manage

DESCRIPTION

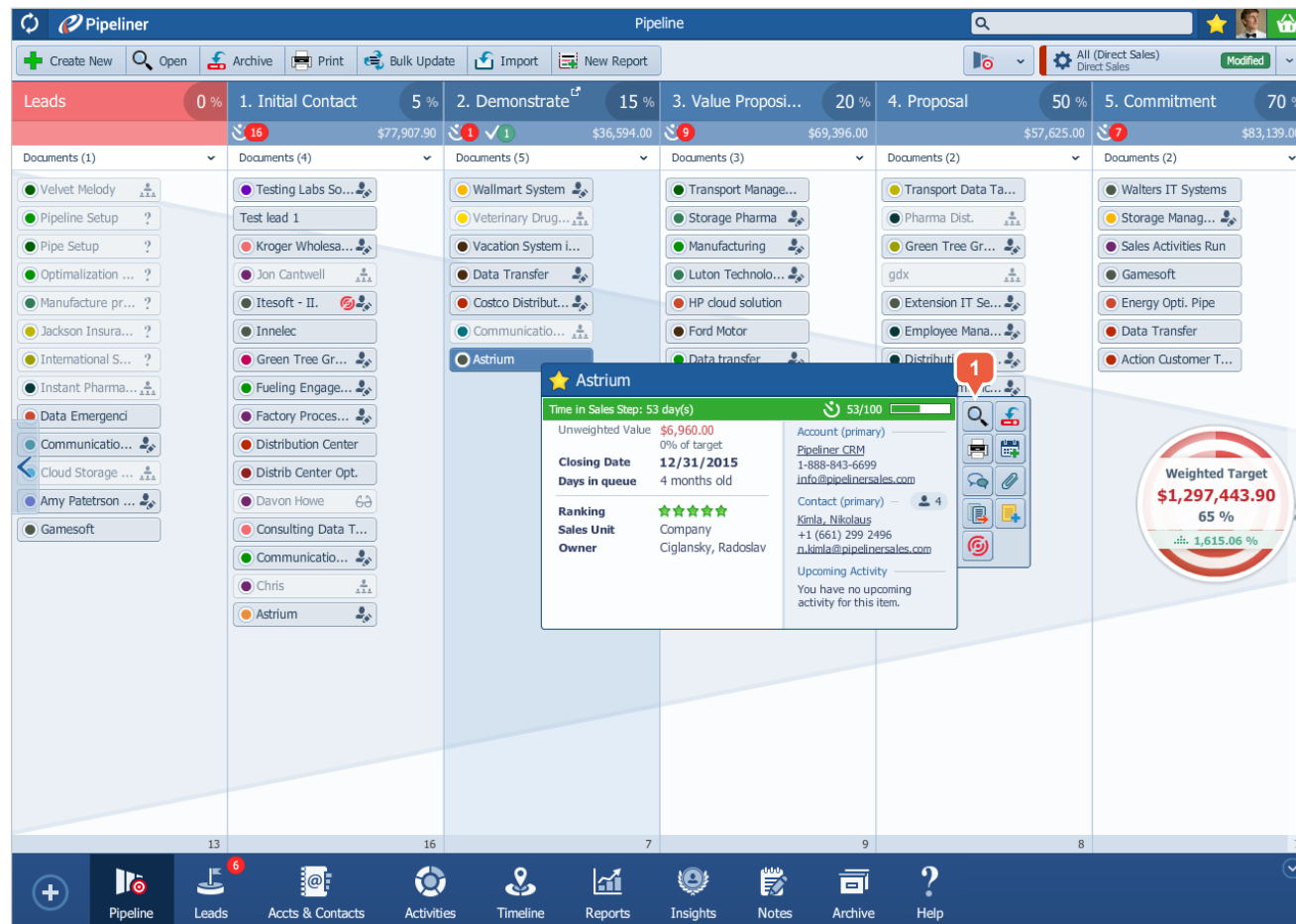
1. Click on the CREATE NEW button and select Opportunity. Pipelinier will create a brand new opportunity for you.
You can give to opportunity any name you like.
2. Enter the expected opportunity value.
3. Assign the closing date.
4. Relate this opportunity to your customer.
5. Once you finished typing 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.

1.2. How do I edit my Opportunity

In order to edit your opportunity please roll over the opportunity.



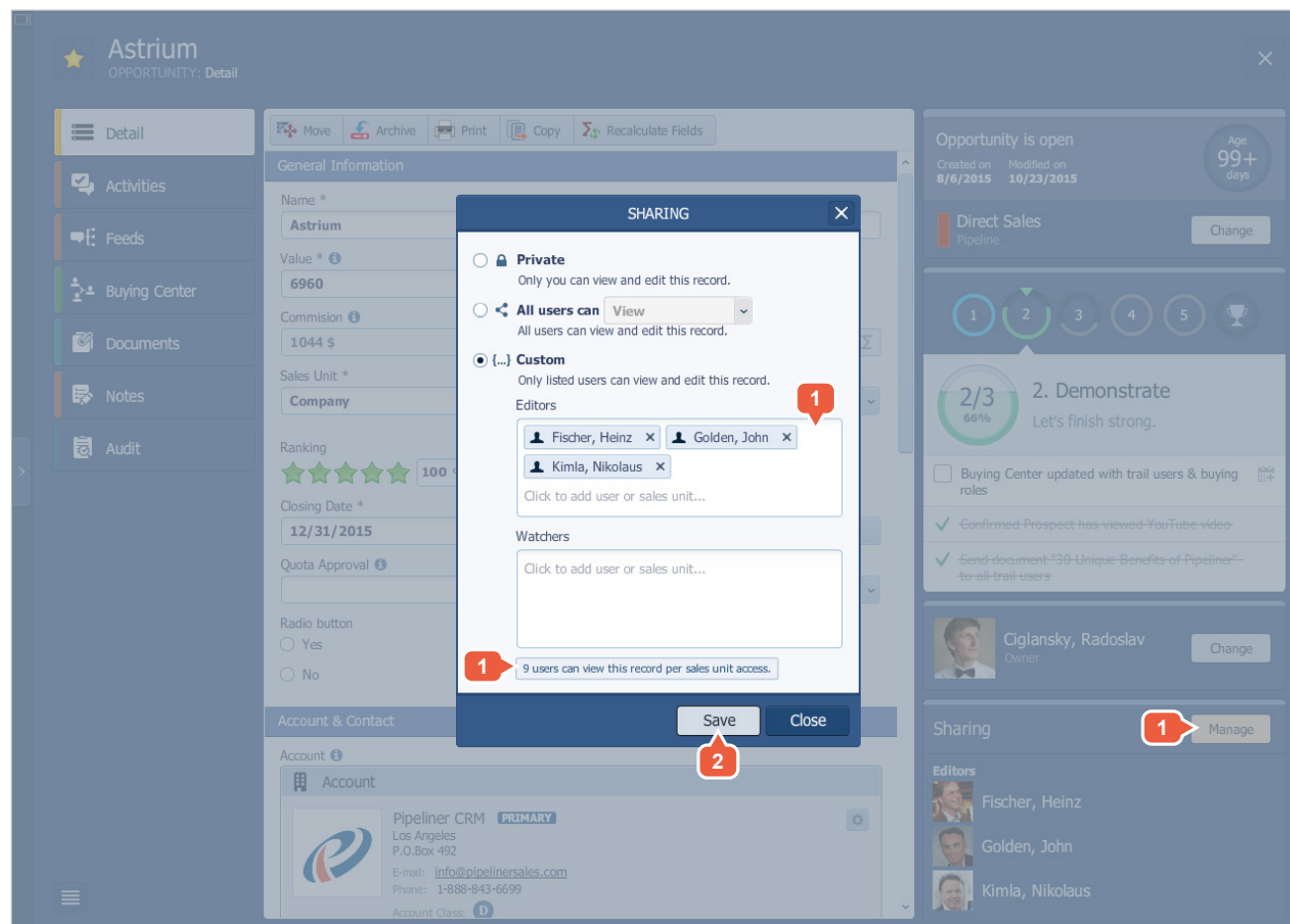
The screenshot shows the Pipeliner CRM interface. The top navigation bar includes 'Create New', 'Open', 'Archive', 'Print', 'Bulk Update', 'Import', and 'New Report'. The main area displays a sales pipeline with stages: Leads (0%), 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), and 5. Commitment (70%). A modal window for 'Astrium' is open, showing details such as 'Time in Sales Step: 53 day(s)', 'Unweighted Value: \$6,960.00', 'Closing Date: 12/31/2015', 'Days in queue: 4 months old', 'Ranking: ★★★★★', 'Sales Unit: Company', and 'Owner: Ciglansky, Radoslav'. A red circle with the number 1 highlights the 'OPEN' icon in the modal window.

DESCRIPTION

1. Click on the OPEN icon. Pipeliner opens for you opportunity control panel with all its related details. Select the opportunity panel.
- Once you finished editing your opportunity, you need to click on the SAVE button and Pipeliner will save all your changes.

1.3. How do I share my Opportunity

Pipeler enables you to share your opportunities with your sales team. You can assign either editors or watchers to the opportunity. Editor can edit the opportunity's details and watcher can only see this opportunity in his sales pipeline overview. In order to share your opportunity, please double click on it. Pipeler opens for you opportunity control panel with all its related details.



The screenshot displays the 'Astrium' opportunity detail page in the Pipeler CRM. A 'SHARING' modal is open, showing three sharing options: 'Private' (only you can view and edit), 'All users can' (all users can view and edit), and 'Custom' (only listed users can view and edit). The 'Custom' option is selected, and users are adding editors (Fischer, Heinz; Golden, John; Kimla, Nikolaus) and watchers. A 'Save' button is highlighted with a red '2' callout. A 'Manage' button in the bottom right is highlighted with a red '1' callout.

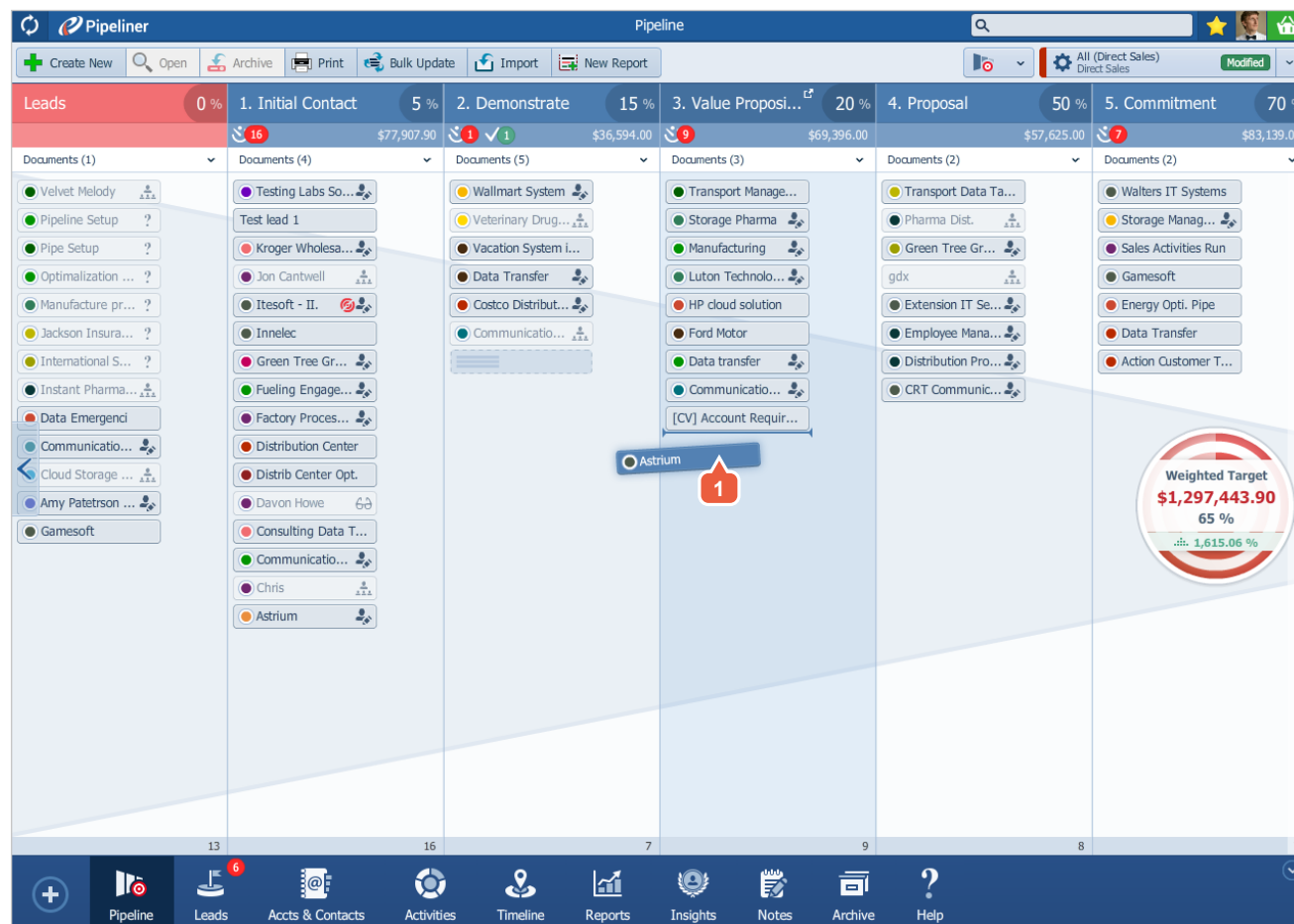
DESCRIPTION

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

2. Moving and closing the Sales Opportunity

2.1. How do I move my Opportunity

Pipeliner power lies in its ability to easy and quickly move your sales opportunities across your sales pipeline from one sales step to another.



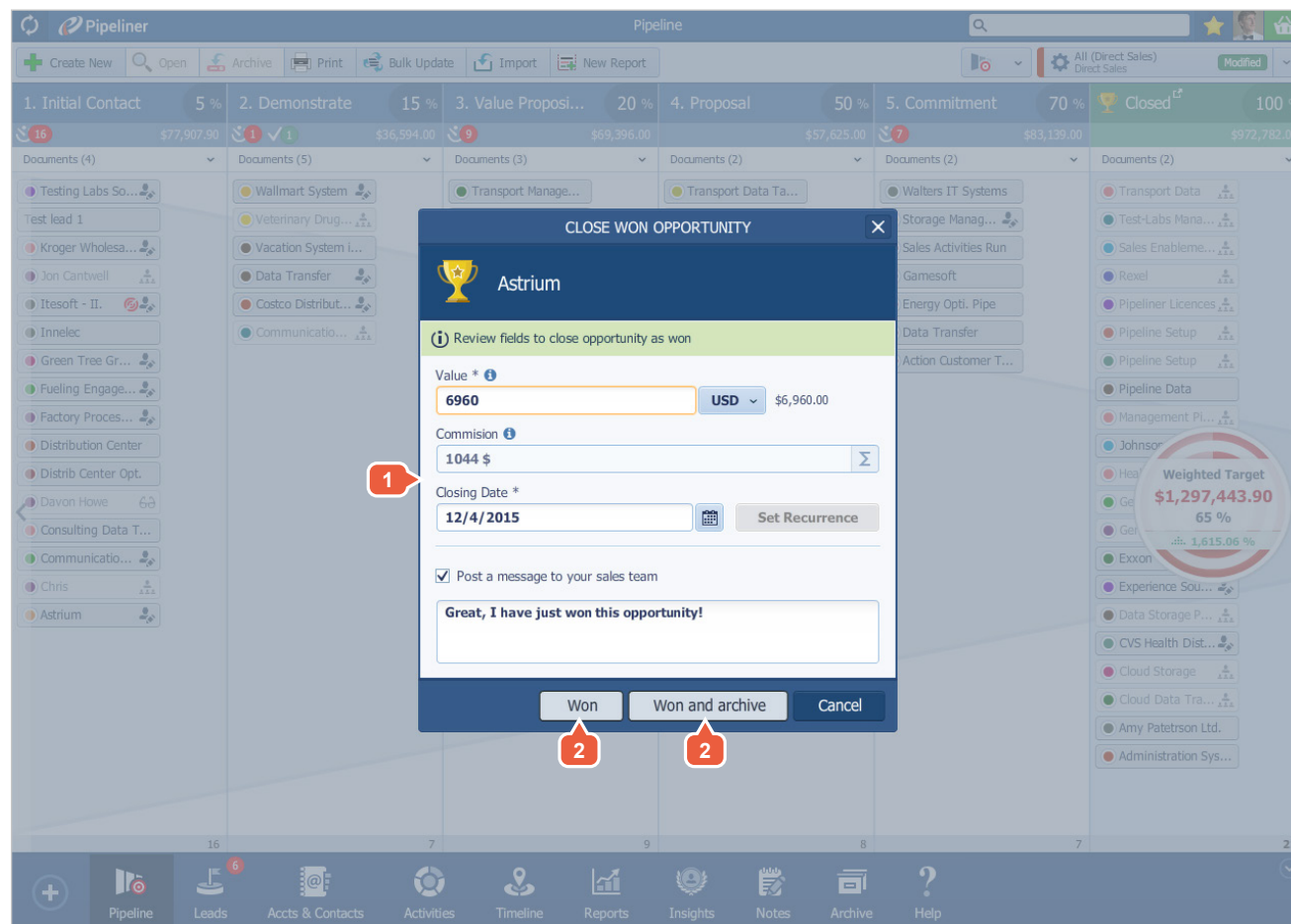
The screenshot displays the Pipeliner CRM interface with a sales pipeline. The pipeline consists of six stages: Leads (0%), 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), and 5. Commitment (70%). Each stage shows a count of documents and a total value. A callout box with a red '1' points to the 'Astrium' opportunity in the '3. Value Proposi...' stage, indicating it is being moved.

DESCRIPTION

- 1 In order to move sales opportunity from any sales step to another, you need to drag and drop it its current location to any sales step you would like to.

2.2. How do I close won Opportunity

Pipelinier provides a very simple way to close your won opportunities. To close won opportunity you will need to drag and drop it from any sales step in your sales pipeline into the last one.



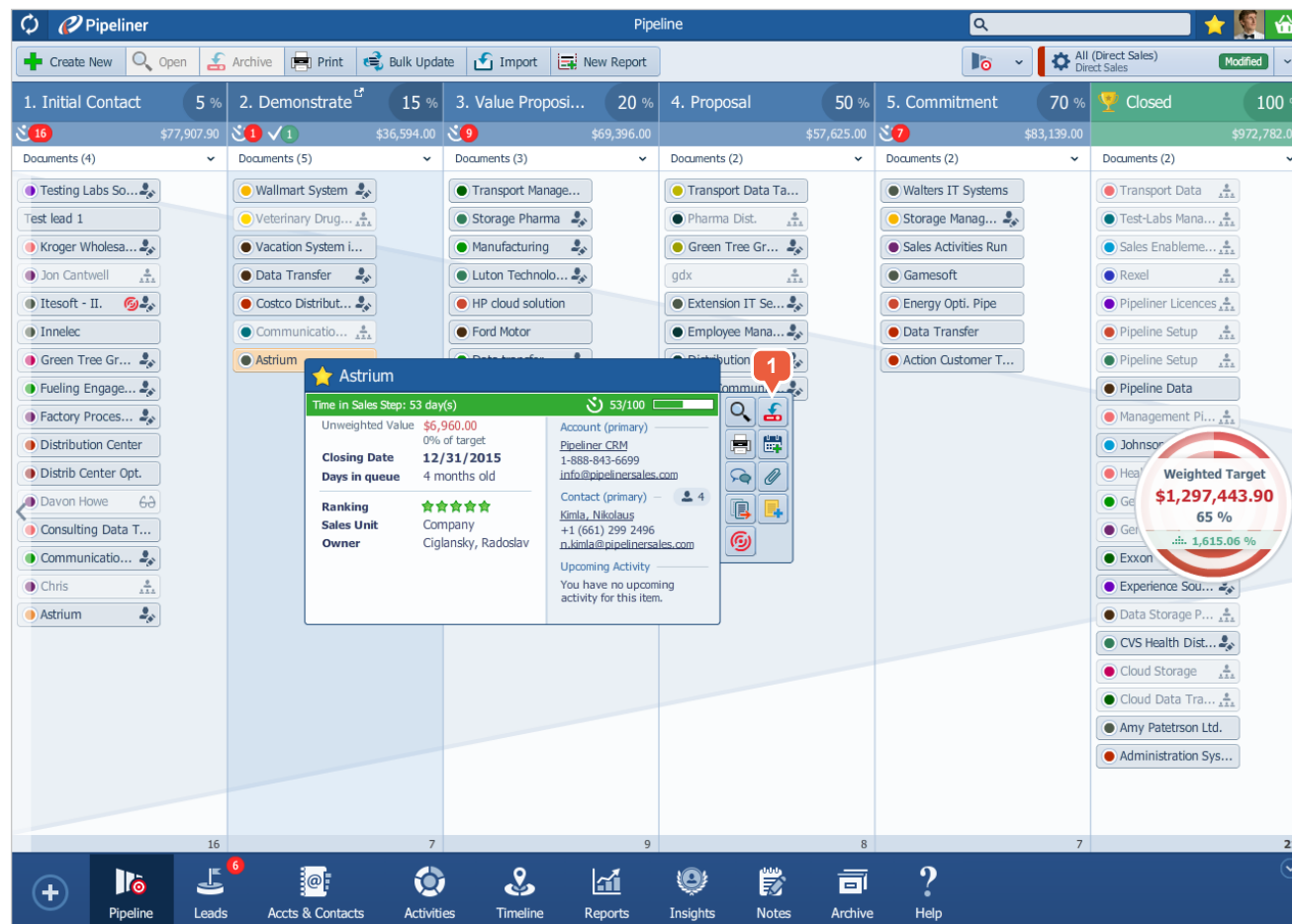
The screenshot displays the Pipelinier CRM interface with a sales pipeline. The pipeline consists of six steps: 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), 5. Commitment (70%), and Closed (100%). A modal titled 'CLOSE WON OPPORTUNITY' is open, showing details for an opportunity named 'Astrium'. The modal includes fields for Value (* 6960 USD, \$6,960.00), Commission (1044 \$), and Closing Date (* 12/4/2015). There is a checkbox for 'Post a message to your sales team' and a text box with the message 'Great, I have just won this opportunity!'. At the bottom of the modal are three buttons: 'Won', 'Won and archive', and 'Cancel'. Red callout boxes with numbers 1 and 2 are overlaid on the modal. Callout 1 points to the 'Review fields to close opportunity as won' section. Callout 2 points to the 'Won' and 'Won and archive' buttons. In the background, a 'Weighted Target' widget shows a target of \$1,297,443.90 at 65% completion.

DESCRIPTION

- 1 After dropping the opportunity into the last sales step, Pipelinier will ask you to define final details of that opportunity.
- 2 Once you finished closing the won opportunity, you need to click on the WON and do not archive or WON AND ARCHIVE button. Please decide which option you prefer and click on it. Pipelinier will save your won opportunity either into the last step in your pipeline or into the last step in your pipeline archive.

2.3. How do I close lost Opportunity

In order to send lost opportunity into archive you will need to first roll-over the particular opportunity. Pipeliner will show you the opportunity extract with all its related tools.



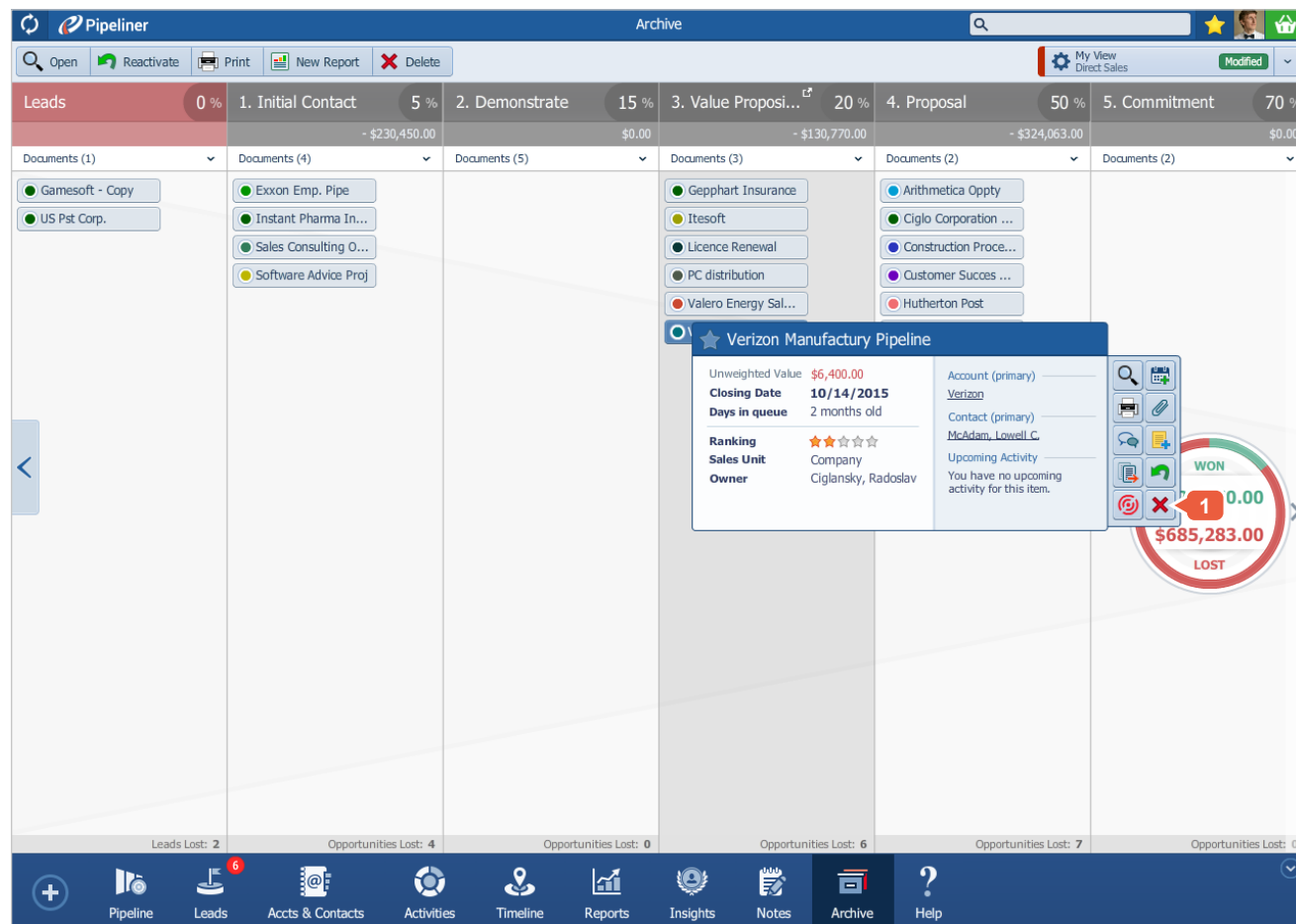
The screenshot shows the Pipeliner CRM interface with a sales pipeline. The pipeline stages are: 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), 5. Commitment (70%), and Closed (100%). A pop-up window for 'Astrium' is displayed, showing details like Unweighted Value (\$6,960.00), Closing Date (12/31/2015), and Ranking (5 stars). A red circle with a '1' highlights the 'MOVE TO ARCHIVE' icon in the tools list.

DESCRIPTION

1. Within the tools list click on the icon MOVE TO ARCHIVE
2. Select the reason of lost.
3. Once you finished archiving the lost opportunity, Pipeliner will save and place your lost opportunity into the same sales step as it was but in the sales pipeline archive.

2.4. How do I delete Opportunity from Archive

To delete an opportunity from your sales pipeline archive you will need to first roll-over the particular opportunity. Pipeliner will show you the opportunity extract with all its related tools.



The screenshot displays the Pipeliner CRM Archive interface. At the top, there's a search bar and navigation icons. Below, a pipeline is shown with stages: Leads (0%), 1. Initial Contact (5%), 2. Demonstrate (15%), 3. Value Proposi... (20%), 4. Proposal (50%), and 5. Commitment (70%). Each stage has a list of documents. A detailed view of the 'Verizon Manufacture Pipeline' is open, showing its Unweighted Value (\$6,400.00), Closing Date (10/14/2015), Days in queue (2 months old), Ranking (4 stars), Sales Unit (Company), and Owner (Ciglansky, Radoslav). A tools list is visible on the right, with a red 'X' icon and a 'DELETE FOREVER' button highlighted. A circular progress indicator shows 'WON' and 'LOST' status with a value of \$685,283.00.

DESCRIPTION

- 1 › Within the tools list click on the icon DELETE FOREVER.
- › Once you finished deleting your opportunity, you need to click on the YES button and Pipeliner will remove this opportunity from your database.

Chapter Title L2

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