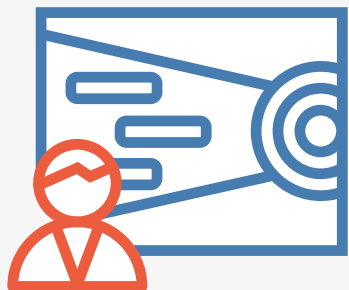


Pipeliner CRM Arithmetica Guide

Sales Pipeline Management



Sales Pipeline Management

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

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1. Configuring Sales Pipeline

1.1. How do I add Sales Step

Pipelinier is a great tool for visualizing layering your sales process into number of sales steps following a standardized approach specific to your business and based on your own best practices. Once you define and configure your sales pipelines to copy your sales process it will be beneficial for everybody in your sales team.

My Sales Space > Sales Pipelines

Configure Sales Steps

Pipeline

Direct Sales

Pipeline configurator 1

Leads - 0% (Leads sales activities are shared between all pipelines) Create Sales Activities

1.	Initial Contact - 5% 25 Day(s)	Edit Sales Activities	4 documents		
2.	Demonstrate - 15% 100 Day(s)	Edit Sales Activities	5 documents		
3.	Value Proposition - 20% 25 Day(s)	Edit Sales Activities	3 documents		
4.	Proposal - 50% 325 Day(s)	Edit Sales Activities	2 documents		
5.	Commitment - 70% 30 Day(s)	Edit Sales Activities	2 documents		
	Closed - 100%		2 documents		

Close

DESCRIPTION

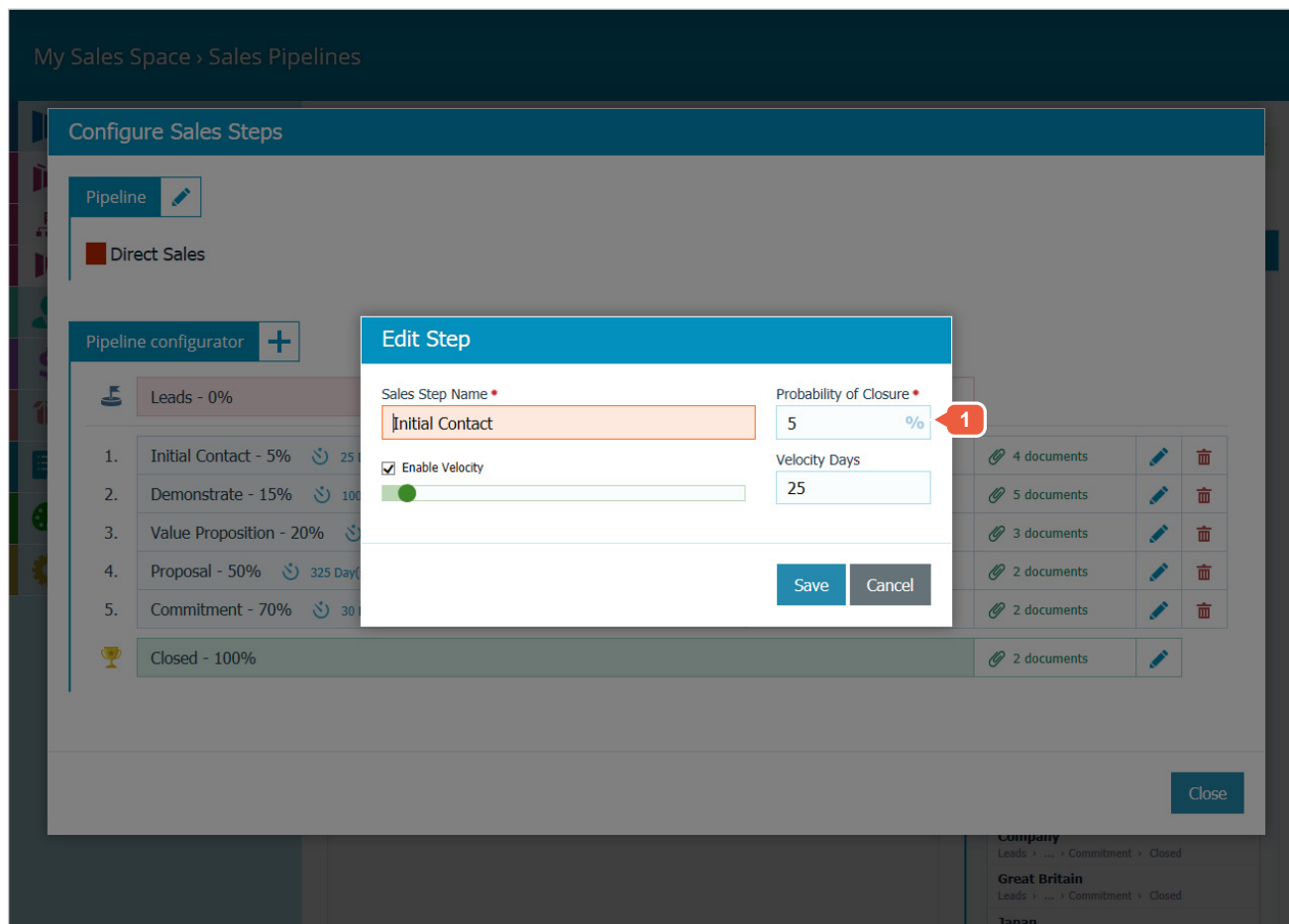
- › To configure and add sales step to one of your Pipelines, click on your PROFILE in the top-right side of Pipelinier application and click on the ADMINISTRATION.
- › Within the main menu click on the SALES SPACE, select SALES PIPELINE and click on EDIT button next to the Pipeline you want to edit.

1 Click on the ADD SALES STEP, define your sales step and Pipelinier will add to your sales pipeline brand new sales step.

NOTE: You need to have admin rights to perform this steps.


1.2. How do I set probability of closure for Sales Step

Tracking your sales opportunities in your sales pipeline is easy. Pipelinier gives you maximum pipeline visibility and at-a-glance insights into the health of your pipeline by defining your sales steps. Each sales step in your sales process has its own weight i.e. probability of closure. The probability of closure is how likely you would close the opportunity within this sales step.




My Sales Space > Sales Pipelines












Configure Sales Steps

Pipeline 

Direct Sales


Pipeline configurator 



Leads - 0%

Step	Name	Probability	Velocity	Days	Documents	Actions
1.	Initial Contact	5%	25		4 documents	 
2.	Demonstrate	15%	100		5 documents	 
3.	Value Proposition	20%			3 documents	 
4.	Proposal	50%	325	Days	2 documents	 
5.	Commitment	70%	30		2 documents	 
	Closed	100%			2 documents	

Close

Edit Step

Sales Step Name  Initial Contact

Probability of Closure  5 % 


☒ Enable Velocity


Velocity Days 25

Save Cancel

DESCRIPTION

- › To set probability of closure of your sales step, click on your PROFILE in the top-right side of Pipelinier application and click on the ADMINISTRATION.
- › Within the main menu click on the SALES SPACE, select SALES PIPELINE and click on EDIT button next to the Pipeline you want to edit.
- › Select one sales step and click on the EDIT icon.

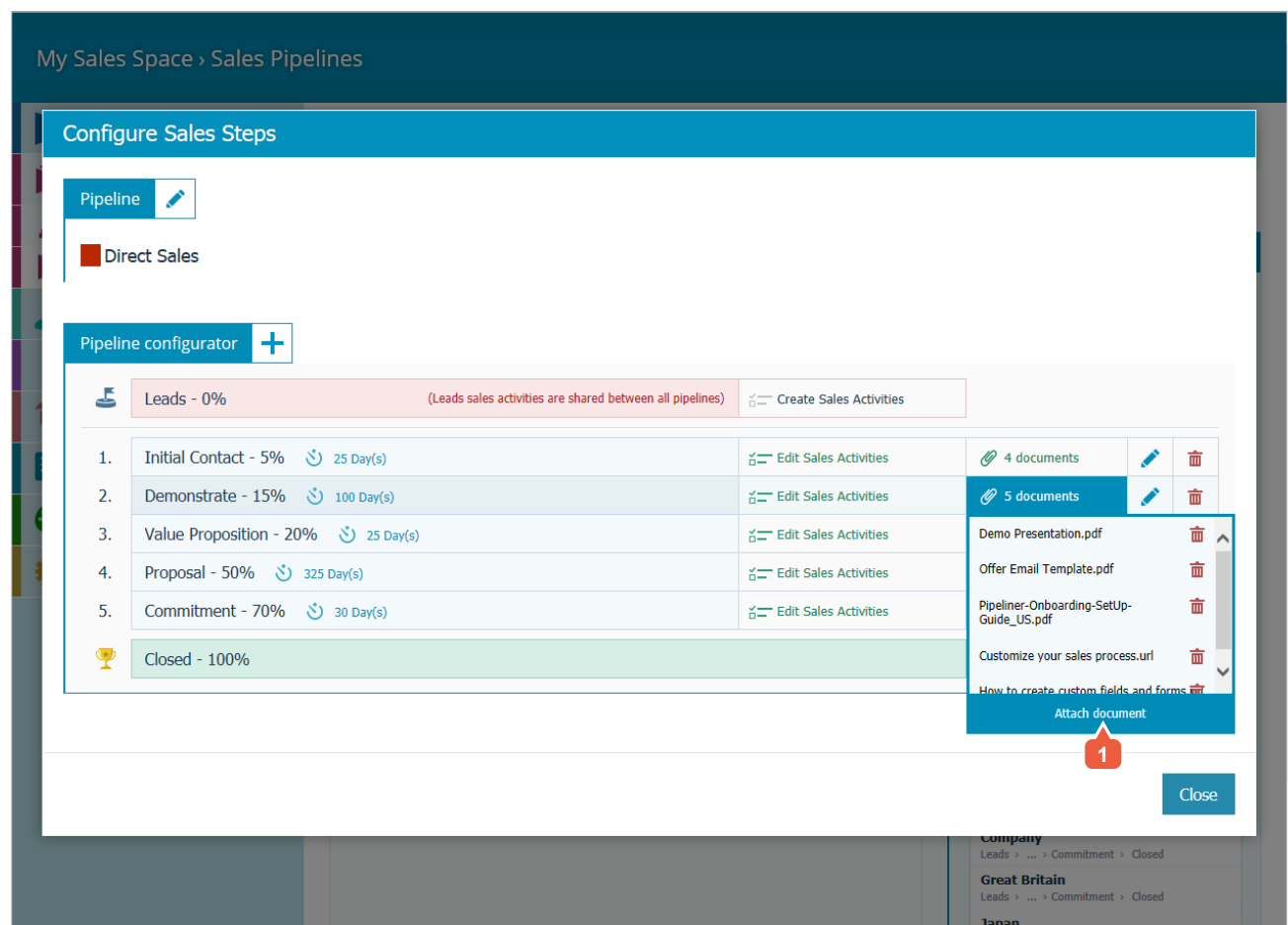
 Now you can set the probability of closure.

 **NOTE:** You need to have admin rights to perform this steps.

2. Adapting Sales Methodology


2.1. How do I create Sales Methodology Document


Pipelinier enables you to organize key sales tools and templates along your sales process to ensure consistent use when actually needed. Develop your sales playbook intuitively and attach your sales methodology to each of your sales step.






My Sales Space > Sales Pipelines











Configure Sales Steps

Pipeline 

 Direct Sales

Pipeline configurator 

 Leads - 0% (Leads sales activities are shared between all pipelines)  Create Sales Activities

Step	Percentage	Duration	Action	Documents	Icons
1. Initial Contact	5%	25 Day(s)	 Edit Sales Activities	4 documents	 
2. Demonstrate	15%	100 Day(s)	 Edit Sales Activities	5 documents	 
3. Value Proposition	20%	25 Day(s)	 Edit Sales Activities		
4. Proposal	50%	325 Day(s)	 Edit Sales Activities		
5. Commitment	70%	30 Day(s)	 Edit Sales Activities		
 Closed	100%				

Documents attached to the 'Propose' step:

- Demo Presentation.pdf
- Offer Email Template.pdf
- Pipelinier-Onboarding-SetUp-Guide_US.pdf
- Customize your sales process.url
- How to create custom fields and forms


1 Attach document

Close

DESCRIPTION

- › To attach document to your sales step, click on your PROFILE in the top right side of Pipelinier application. Click on the ADMINISTRATION.
- › Within the main menu click on the SALES SPACE, select SALES PIPELINE and click on EDIT button next to the Pipeline you want to edit.
- › Select one sales step and click on the EDIT icon.

- 1** › Choose the sales step to which you would like to attach document and click the ADD DOCUMENT button.
- › Browse for your document and click SAVE.

 **NOTE:** You need to have admin rights to perform this steps.

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