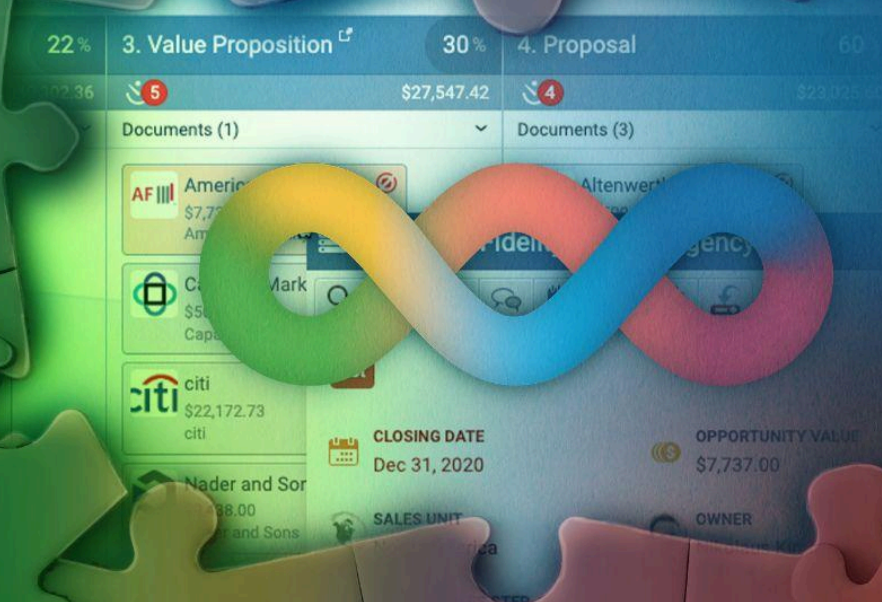




# Pipeliner CRM

# CUSTOM ENTITIES



Service Packages • 05

SCOPE OF WORK

## Overview

This requirement for this “**Custom Entities**” package can be identified at any point of a Pipeliner implementation – for example, during the Core Implementation when a business need that cannot be met by the out-of-the-box system record entities is identified or as part of the evolution of using Pipeliner within your business to extend into new business areas or teams.



Our *Core Implementation* package is the first part of our “**Infinity Onboarding**” model which encourages a practice of regular review and optimisation of your Pipeliner CRM system to ensure that it continues to evolve and expand to meet the needs of your business.

## Analytics Consultancy & Training

These workshops sessions are designed to discuss and capture your business requirements and to establish that using a Custom Entity is the best approach to meet the specified needs. The fields required for data capture and the multiple relationships that are needed to embed the new Custom Entity seamlessly into Pipeliner will need to be defined and implemented. Our aim is to ensure that your Admin team has a clear vision of when to use *Custom Entities* as well as the skills to create and configure them effectively.

**The *Custom Entities* package covers the following:**

- ✓ Establishing that business requirements can be best met using a Custom Entity
- ✓ Creating the Custom Entity
- ✓ Creating Fields and Forms for the Entity
- ✓ Establishing and creating the required relationships with, for example, Accounts and/or Opportunities
- ✓ Amending user roles to allow correct access levels to the Custom Entity

## Pipeliner's Commitment to You

Our implementations team will work in collaboration with your Pipeliner Admins and Leaders using a “**side-by-side**” model. This approach fully includes the relevant team members in the specification, creation and modification of *Custom Entities* equipping them with the knowledge and skills they need to use this advanced feature to embed the use of Pipeliner in your business.

## Your responsibilities

**In order for any project to be successful, we will rely on you to:**

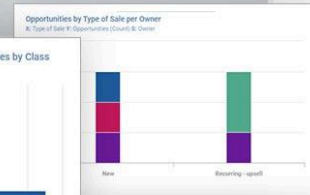
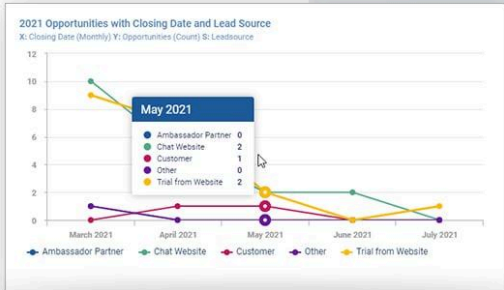
- Nominate the right colleagues to be included in your project team, ensuring that they have an appropriate level of knowledge to participate fully in the design process and that they are willing and able to provide written specifications in a timely manner
- **As part of the initial build, you'll need to be able to:**
  - Fully define your reporting requirements, audiences, responsible team members

## What's Not Included in the Analytics Package

The following are not included in the Analytics package though, of course, are covered in detail in our other Professional Services Implementation packages. Having utilised our expertise in implementation and training, your own Admins will be able to evolve and update all of these features going forward:

- ✗ Configuration covered in our Core Implementation Package
- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Standard User of Admin Training (*a separate training package will be offered*)
- ✗ Configuration covered in our Core Implementation Package

- ✘ Data Import (*though some advice on data preparation will be offered*)
- ✘ Training (*a separate training package will be offered*)
- ✘ Reports and Dashboards
- ✘ Forecasts and Targets
- ✘ Email Sequences
- ✘ Appointment Scheduler pages
- ✘ Calling & Messaging
- ✘ Email Templates
- ✘ Document Templates
- ✘ Approval Processes
- ✘ Automatizer Processes



# Pipeliner CRM

**Exceptional Engagement**

The Better CRM > Built for Sales, Used by Sales!



The Pipeliner Universe – Sales Enablement, Knowledge, Networking

Pipeliner CRM  
[pipelinersales.com](http://pipelinersales.com)

Sales POP!  
[salespop.net](http://salespop.net)

Go Ahead!  
[go-ahead.global](http://go-ahead.global)