



PIPELINER CRM

EXTENDED PROFILE



OVERVIEW

Pipeliner CRM from Pipelinersales Inc. caters to companies of all sizes, aiming to deliver a service that feeds the relationship between sales management and salespeople through easily understandable and actionable software.

Pipeliner CRM delivers a service focusing on individuals, both from a customer and user standpoint, and is ideally suited for companies who place responsibility on their salespeople to use initiative in generating leads and closing sales. By supplying the tools to monitor and manage sales from lead generation through to after-sales, Pipeliner CRM gives companies and their employees the control to maximize productivity with a personal touch.

Delivering a comprehensive software solution for all CRM needs, Pipeliner CRM focuses on tracking relevant information to improve sales performance on an individual and team level, with a fully customizable interface allowing adaptation for a better user experience. With a strong focus on visibility throughout, Pipeliner CRM offers navigation, performance insight and task management tools with one click reporting to minimize workload.

Pipeliner CRM is installed on the user's premises and can be accessed via desktops and native mobile apps available on both iOS and Android.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Pipeliner CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✗
SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
HOSTING METHOD	

CLOUD	✗
ON-PREMISE	✓
FURTHER INFORMATION	
PRICING	£18/user/month

SOFTWARE SCREENSHOTS



No.	Name	Closing Date	Sales Step	Ranking	Owner	Sales Value
4.	Customer Service Pipeline	4/28/2017	1. Initial Contact	★★★★ (50%)	Golden, John	3,000,000

No.	Full Name	Primary E-mail	Primary Phone	Street Address	City
1.	Kimla, Nikolaus	n.kimla@ppl-horwath.com	+1 (841) 299 2496	13209 W. Sunset Blvd S.	Los Angeles

No.	Subject	Type	Description	Priority	Assignee
1.	A meeting with Nikolaus	Task			
2.	A meeting with Nikolaus	Appointment			

REPORT PROPERTIES

Report Name *
Opportunity

Report Type *
Standard Table

Pivot Table
Advanced Table

Lead
Opportunity
Activity
Products and Services

Use existing profile to create a new report

Next Close

Opportunities

My Team View

Control Panel

Opportunities created by

Opportunities filtered by

Opportunities grouped by

Opportunities sorted by

Opportunities filtered by criteria

Opportunities grouped by criteria

Opportunities sorted by criteria

Opportunities filtered by criteria

Opportunities grouped by criteria

Opportunities sorted by criteria

Name	Value	Percentage
Kimla, Nikolaus	\$ 215,800	100%
Cook, Julie	\$ 192,300	93%
Golden, John	\$ 134,254	62%
Thomas, Carrie	\$ 104,250	50%
Todd Martin	\$ 57,227	27%

Category	Count
Created Accounts	33
Open Accounts	19
Qualified Leads	8
With Opportunities	37
Lost Leads	24
Lost Opportunities	6

Weighted Target: \$347,657.70

Current Financial year: 412,914,712.17

Current Financial year: 412,914,712.17

Current Financial year: 412,914,712.17

Business Overview (unweighted value)

Status	Value
Open opportunities	\$363 441,00
Won opportunities	\$340 405,00
Lost opportunities	\$175 030,00

Opportunities

Lead Development New Business Strategies

All Opportunities

1. Introduction

Communication Centre 13 000,00

Communication Pipeline 11 900,00

Gaborone 15 000,00

HP cloud solution 36 000,00

Itsoft 3 150,00

Open Lead Electric Car

Overview Detail Activities Feeds Docu...

Days in queue 7

★★★★☆ 80%

Labels: FOCUS, HOT, STALLED