

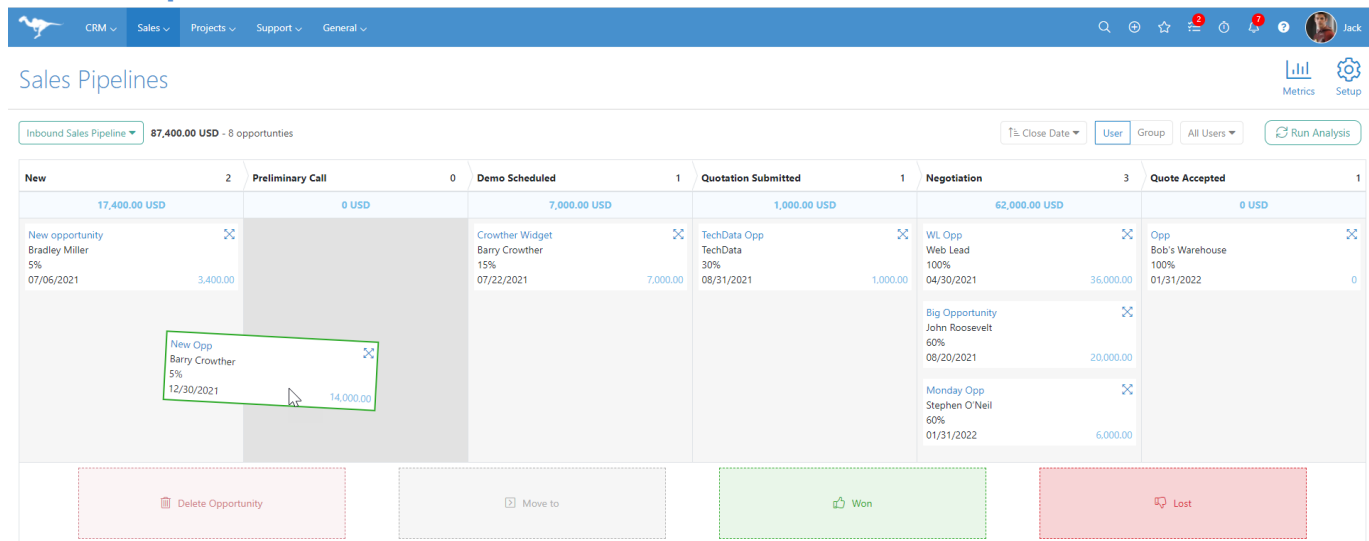
Phase 4 of Major Sales Update: Sales Pipelines

This is the fourth in a series of updates that are focused mainly to the Sales & Marketing Extension. In this release we introduce Sales Pipelines, a visual representation of your sales process to help your team view the visual progress of your sales Opportunities as they are captured, nurtured and converted. Unlike a Sales Funnel, which is taken from the lead's point of view, the Sales Pipeline is taken from your team's point of view, allowing them to see what actions can, and need, to be taken to advance the Opportunity to the next phase.

Key

- ★ **New Feature**
- ↻ **Change to Existing Feature**
- ⚙️ **Setup Instructions**

★ Sales Pipelines



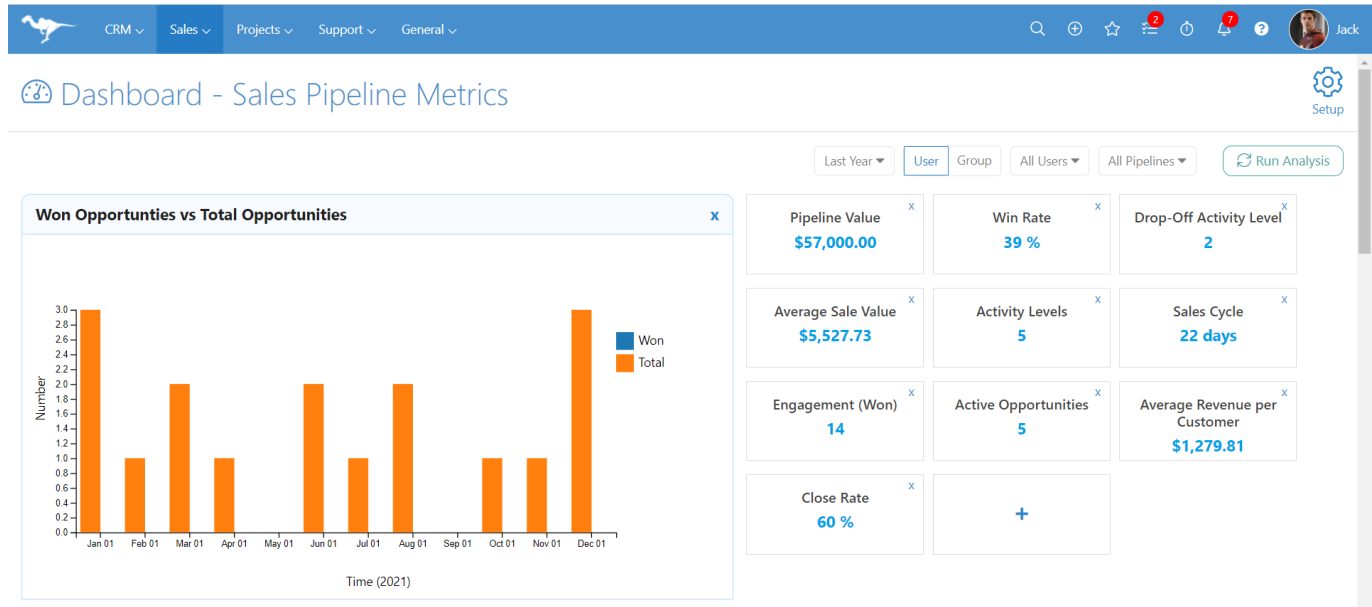
A Sales Pipeline will let you stop guessing where your sales process is, and enables you to set up automation to help nurture your Opportunities through the Pipeline. It will visualize the different Opportunity phases and show you where every single Opportunity is. You will be able to setup as many different Pipelines as you need to customize it for your business.

See a map of your sales process and how each Opportunity Phase is performing and how much potential revenue each phase represents. Adjust your parameters accordingly to see the performance of specific Users, Groups, or everyone in Sales. Once you've added the necessary filters, just click on [Run Analysis](#).

Opportunities can advance through the Pipeline automatically when specific goals have been achieved that have been configured in the setup. They can also be moved manually by dragging-and-dropping them inside the Pipeline view, or by updating them inside each individual record.

You can also drag-and-drop the Opportunity into one of the depositories at the bottom of the page, to **Delete**, **Move To** another Pipeline, or close the Opportunity as **Won** or **Lost**.

★ Sales Pipeline Metrics



Knowing how your business, sales teams, and individual salespeople are performing on key sales metrics gives you the knowledge that you need to make better informed decisions to gain a competitive advantage.

The Sales Pipeline Dashboard is an effective tool to analyze and visualize important sales KPIs, for users or groups over a specified time period, for a specific Pipeline or all Pipelines combined. Once your preferred parameters are selected, just click on [Run Analysis](#) to refresh your dashboard.

You can customize your dashboard with metrics that are important to you, such as:

- Active Opportunities
- Average Revenue Per Customer
- Average Sale Value
- Close Rate
- Drop-off Cycle
- Engagement (Won and Lost)
- Pipeline Value
- Total Pipeline Opportunities
- Weighted Funnel
- Win Rate

... and much more.

Please note that our Top Menu has also been revised to account for these new features, and have organized dashboards into their own section.

Setup Instructions

Sales Pipelines can only be defined by an Admin user. To create a new Pipeline, navigate to **Setup > Sales > Sales Pipelines** and click [+ Add Pipeline](#). Once you name the Sales Pipeline, click [+ Add Opportunity Phase](#) to select from the existing Opportunity Phases. They can be edited by clicking on the [Edit](#) link, or access them under **Setup > Sales > Opportunity Phases**.

Once you've decided on your Sales Pipeline's Opportunity Phases you can start adding the automation triggers by clicking on the "+" symbols in the empty boxes. For each phase you'll be able to pick from these automation triggers:

- **Assign Owner** - Assign a different User as the Opportunity's Owner when entering this phase.
- **Alerts** - Send an internal notification, or send an email or SMS notification to the Default Contact.
- **Goals** - Automatically progress Opportunities from the selected phase to the next if these goals are met.
- **Activities** - Create Tasks, Calls, and Update Stream posts to help with this phase's Goals.
- **Email Sequence** - Start a sequence of emails to the Default Contact when this phase's Goal is met.

The screenshot displays the 'Setup > Sales Pipelines' interface. The main content area is titled 'Inbound Sales Pipeline' and includes an 'Edit' link. Below the title, there is a section for 'Opportunity Phases' with a '+ Add Opportunity Phase' button. The phases are listed as follows:

Phase Name	Progress
New	5%
Preliminary Call	30%
Quotation Submitted	60%
Quote Accepted	100%

Below the phases, there are several configuration sections:

- Assign Owner:** Assign a different User as the Opportunity's Owner when entering this Phase. It shows three columns with owners: Arnold, Jack, and Constantine.
- Alerts:** Send an internal notification, or send an email or SMS notification to the Default Contact. It shows three columns with 'Internal Notification' triggers.
- Goals:** Automatically progress Opportunities from the selected Phase to the next if these goals are met. It shows three columns with 'Task Completed' triggers.
- Activities:** Create Tasks, Calls, and Update Stream posts to help with this Phase's Goals. It shows three columns with 'Create Update Stream Post' triggers.
- Email Sequence:** Start a sequence of emails when this phase's Goal is met. It shows three columns with 'Send Appointment Link' triggers.

A 'Save' button is located at the bottom right of the configuration area.

Now that we have released **Sales Pipelines**, watch for **Sales Forecasting** to be released shortly.

We hope you will enjoy BlueCamroo 8.3.4, if you have any questions about this release, or if you have any suggestions or comments, please send an email to support@bluecamroo.com. We'll be glad to help!

The BlueCamroo Team