# Using and Configuring Pipeline Plus

Introducing Pipeline Plus

Understanding Your Pipeline

Before looking in detail at the features of the Pipeline Plus program its worth spending a little time understanding the approach the application takes to building your sales forecast. With this in mind you'll find that configuring your regular reports is an easy task.

First spend a moment familiarising yourself with the diagram below:
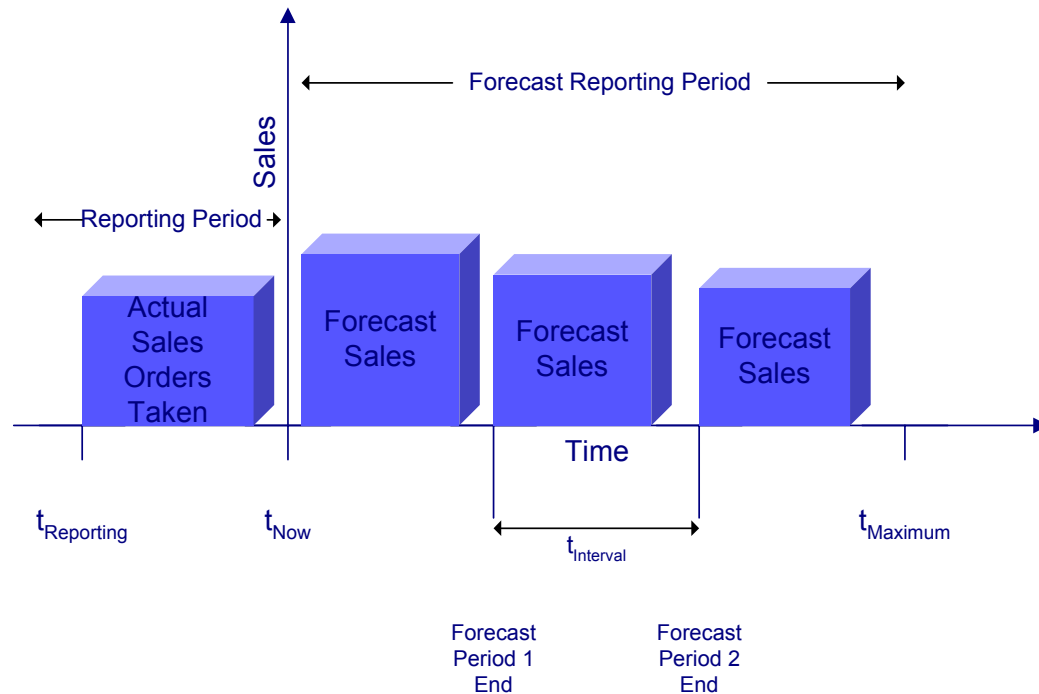
You'll want to know three main things from your pipeline report

- How did we do in the last reporting period? (The **Sales Report**)

and

- What might we sell in the forthcoming periods? (The **Forecast Report**)

Pipeline Plus will collate the information you need to answer both of these questions from the opportunity data in your Maximizer database. In order to do this, however, we need to be able to define the way our reporting period.

The Reporting Period
Pipeline Plus supports a reporting and forecasting periods that are defined as a number of weeks or calendar months.   This period is shown as $t_{Interval}$ on the diagram.

The Sales Report and the Forecast Report
In each report Pipeline Plus will collate information for your Sales Report from the start of the most recent reporting period. For example, if your reporting period $t_{Interval}$ is a month, the start date of the report ($t_{Reporting}$) will be the 1st of the current month. When you run you report at the end of the reporting period the Sales Report will contain the full analysis of your sales in that period.

How far ahead you look in you Forecast Report is usually also defined using the same $t_{Interval}$ time period. For Example, if you report in months, your Forecast Report period may be three

months ahead as in the diagram above.   The number of $t_{Interval}$ periods ahead that you choose to forecast will normally determine the end date of the report ($t_{Maximium}$)

The nature of the Maximizer system means that sales staff are continuously updating the status of the opportunities in your system. As a result **it is very important that for comparative purposes you always run your reports at the end date of each period**. Since things are continuously changing in Maximizer you cannot go back and run a period end report later if you miss the date, you have to capture the moment.   During each reporting period Pipeline Plus reports can be created related to the current date (t_{Now}) this means that as you work through a reporting period you can watch the total in you Sales Report build up.

Pipeline Plus as a Management Tool
Your Sales Report and Forecast Report will of course only be as accurate the information that has been entered into Maximizer. Pipeline Plus is therefore designed to be much more than just a fancy report, it is designed to be an integral part of the way you work with your sales team.   There are two main areas where Pipeline Plus can help.

> First there's the purely technical question of whether the opportunities entered into Maximizer make sense at all. e.g. has the estimated close been passed or has the revenue been estimated? Pipeline Plus will check for these errors so that they can be corrected before your import of end of period report.

> Secondly Pipeline Plus contains a reporting system that highlights changes and progress on Opportunities since your last period end report in order that you can easily review each sales team/sales executives opportunities with them.

Pipeline Plus Versions

There are two versions of the Pipeline Plus product Sales Manager and Sales Executive the only difference between the two products is in the scope of the data collected. The Sales Executive version is designed to help a sales person manager there own part of the company sales pipeline. When the sales executive program is used you can only report on the opportunities that are allocated to the currently logged in Maximizer user. The sales manager program always reports all of the opportunities that are visible to the current Maximizer user.
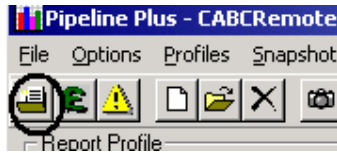
The Pipeline Plus Reports

Pipeline Plus generates a set of reports each of these will help you with the management of your pipeline and sales teams. The reports are summarised below and explained in detail later in this guide.

| Report	Part of	Usage Summary
Pipeline chart	Forecast Report	Top level graphical presentation of your sales pipeline
Pipeline summary	Forecast Report	Numerical presentation of your total pipeline
Top Closed	Sales Report	Highlights your most valuable wins and Losses
Top in Progress	Forecast Report	Highlights your best opportunities
All in Progress	Forecast Report	A reference list of everything in the reporting window
All Won	Sales Report	Everything Won in the reporting period
All Lost	Sales Report	Everything Lost in the reporting period
All Abandoned	Sales Report	Everything Abandoned in the reporting period
All Suspended	Management Report	Everything that you've suspended
Alerts	Management Report	Opportunities to review with the sales team
Comparison With …	Management Report	Comparison with last month/report
All Opportunities		A reference list of everything in the report

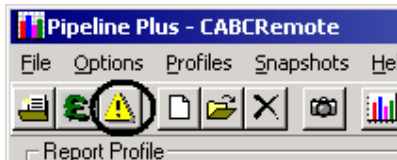## Report Configuration Options

Company Personalisation

To personalise your reports from Pipeline Plus you can enter your own company name and logo using the **Options/Company Details** menu.

When you select a logo, don't use one that's too big. About 2 or 3 cm will usually be a good size.
'
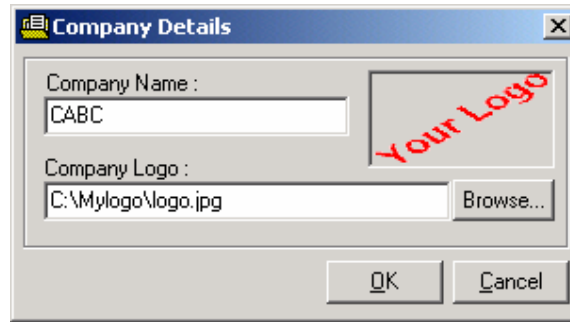
Alert Settings

To help you to review opportunities that need checking you can configure Pipeline Plus to check for certain common problems.   Any opportunities that have these problems will be highlighted on the Alerts page of the Pipeline Plus report.   Set the alerts with the **Options/Alert Options** menu. Use the Alert report as a not just a way to make sure your opportunities are filled in a meaningful way, but also a way to identify opportunities that need careful reconsideration of how they're progressing.

Why are these alerts important?

No Close Date
How can you consider an opportunity qualifies if you can even make a guess at the date a sale may occur? Close dates are also important because opportunities with a close date don't appear in your forecasts.

Close Date Passed
Opportunities that don't come to fruition are easily lost from your reports if you don't keep and eye of for missed dates. Turn on this option so that your Alerts report list opportunities where its essential to review not on the current best estimate for the close date but also… why did we miss the expected date?

Opportunity Has No Value
Clearly there's a problem if you've no idea of the potential value, your best guess is always better than no value at all. If you can't set a value, all you really have is a lead or enquiry.

Opportunity Has No Probability
Setting realistic best estimates of your chance of winning a deal is essential to the generation of any kind of weighted revenue report. Set probabilities for every opportunity and try to review them regularly so that they are always your best guess.

Opportunity Has No Team
In most cases Sales organisations work in teams. If opportunities are not entered correctly the become 'single user' and are invisible to team members. This report will help you catch these but you'll need to run the report as MASTER to make best use of this feature.
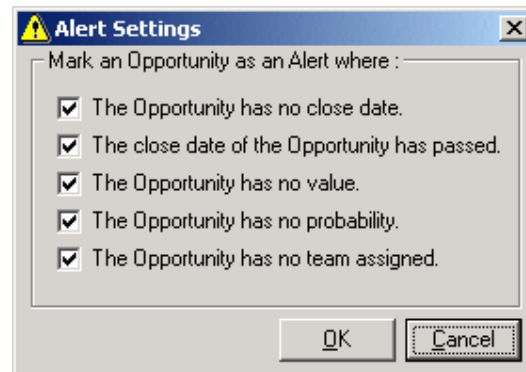
Define Your Report Profile

I n order to enable your to easily and quickly prepare reports in standard formats each report is based on a profile which is saved in your Pipeline Plus application. You can save one or more profiles for different purposes. You can Create, Modify or Delete Profiles using options on the Profiles menu.
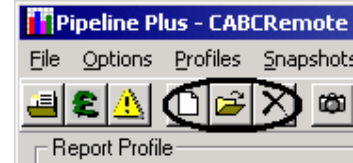
Profile Settings

The Profile Info
Name: Each profile needs a name to identify it.
Description: You can use the description to add comments to your profile such as a reminder as to why this particular profile was created.

Split Options
The split options affect the way in which information will be presented in your Excel Workbook. There are two options:

Split Which causes splits to be created in the workbook for you so that as you scroll the data in the report the column headers always remain visible.
Hide Headings To make you spreadsheet more 'report like' Pipeline Plus can automatically hide the normal Excel column and Row headers.

Top n Options
Set the number of each type of opportunity you would like to see summarised in the Top in Progress and Top Closed report pages. Setting any of the counts to 0 will cause the relevant section to be omitted from the report.

Scale and End Date
These options define the basic reporting interval and how far ahead you will normally forecast when you use this report. When a report is created using this profile these setting will be used to calculate the suggested report start and end dates.

Opportunity and Company UDF's

You can add the values of up to 15 User Defined Fields to your report, by picking the on the Opportunity/Company UDFs tab.

Although you can pick up to 15 UDFs It's probably better to keep your reports to a smaller number of essential fields whenever possible.

You can Mix Fields to the company and Opportunity, so for example you can report industry information from the company and Lead Source information form the opportunity.

If your UDFs have less than friendly names then use the displayed names button to give the field an alternative and tidier name on the spreadsheet report.
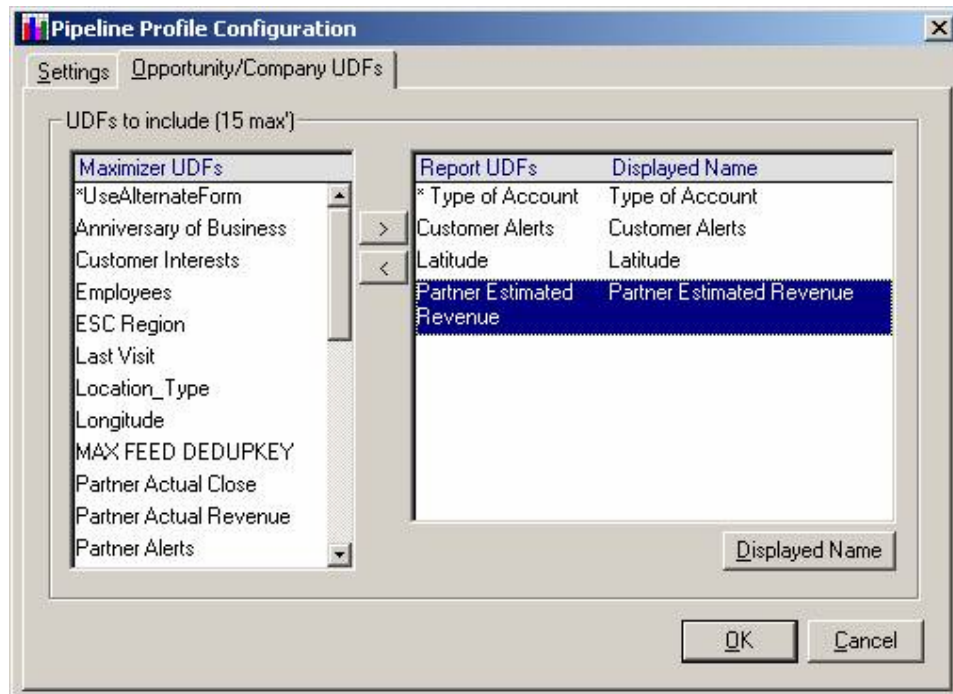

Multi Currency Settings
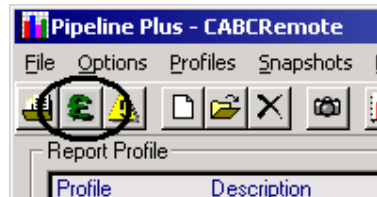
A powerful feature of Pipeline Plus is the ability to 'Roll-up' opportunities entered in more than one currency into a report in a single currency. To do this you will need a UDF on either the Company or Opportunity that defines the currency used for the client or opportunity.

You must define the currencies you will be using (Items on the UDF) and the conversion rates that you require to be used.

Running Your Report
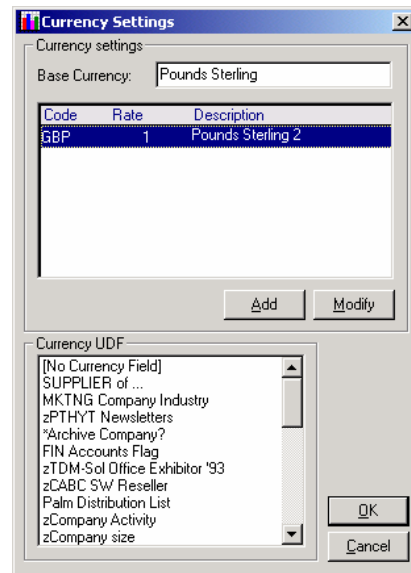
Run your report by first highlighting the profile you want to use then using the **File/Create Pipeline Report** menu or shortcut icon or the **Report** button.

Before running the report there are a few options to confirm that are displayed on the main Pipeline Plus screen.
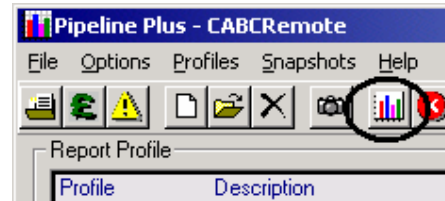
Although the Report Start and End dates will generally be calculated from your settings in the profile you can change them if you need to. Clicking into the date fields will provide you with access to a pop-up calendar to help select the dates.
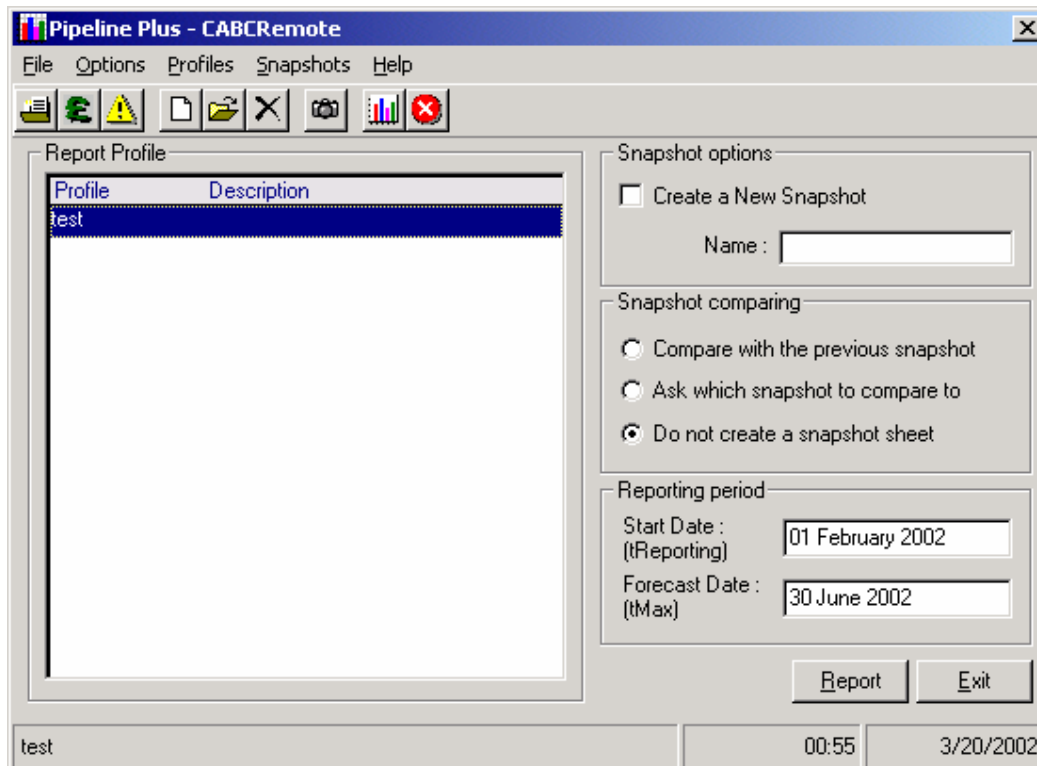
Snapshots

Snapshots are a powerful way to achieve insights into how your pipeline has changed since your last report. When you create your regular end of period reports you can chose to have a snapshot created. Snapshots capture the essential details of all the opportunities in the report you're currently running. In the future when you run reports you can select from you library of snapshots which previous data should be compared with the current opportunity states. The report highlights the current and previous data columns in different colours and draws particular attention the values that have changed.