Pipeline Plus *Version 2.5*

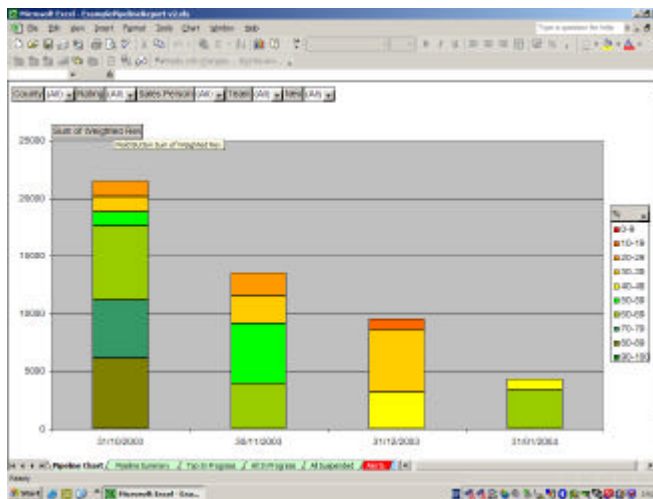**Sales Management Tool for Maximizer**

Understand the sales performance of your company!

Both middle and senior management will find **Pipeline Plus** an indispensable tool for everyday business.

Much more than just a reporter, **Pipeline Plus** is a complete management tool for your sales team and pipeline review.

This add-on for Maximizer enables you to generate detailed sales forecast and activity reports, and a pipeline summary, at the touch of a button!

Tedious end-of-month reports will become a thing of the past!

Pipeline Plus Features ...

♦ Sales Executives can build their own forecast and sales report quickly and effectively

♦ Sales Managers and Sales Directors can roll up the entire sales forecast and reports into one plan

♦ Inbuilt alert pages keep your sales people on their toes!

♦ Provides comparative analysis with previous forecast reports

♦ Allows you to interrogate any report using company or opportunity UDFs

♦ Supports multi-currency roll-up into a single currency with currency conversion.

♦ All changes in opportunities are highlighted to display modifications clearly

Information Filtering
Pipeline Plus allows you to customise fields to suit your precise business requirements.

This flexibility means that your sales information can be filtered by any category, such as sales team, probability of win, sales person, and so on. The result is an instant and clear understanding of sales, both those achieved to date and those in the pipeline.   *All data presented in Microsoft Excel.*

Snapshots and Comparative Analysis
By saving a snapshot report from a given month, Pipeline Plus has inbuilt functionality which allows you to generate a comparative report between a saved snapshot and the current report.

Any changes which have occurred during the given period are highlighted in yellow for ease of comparison.

Restricted Access to Sales Information
Pipeline Plus is supplied with a choice of two versions, one for the sales manager and one tailored specifically to the sales person. This provides an additional element of control within your sales team. While sales managers will be able to view all the opportunities of any team of which they are a member, the sales person is only able to view the opportunities specifically assigned to them.
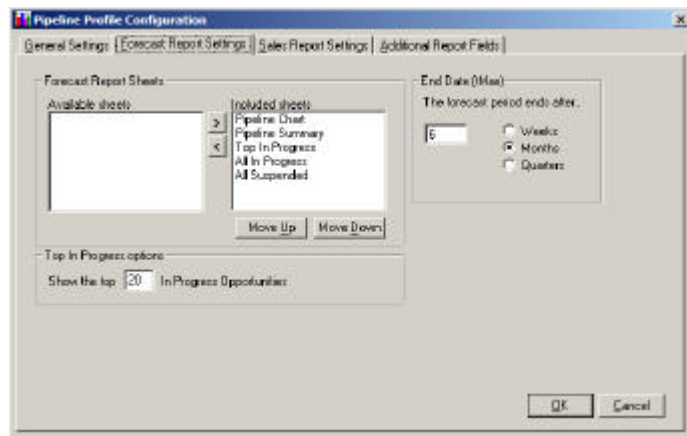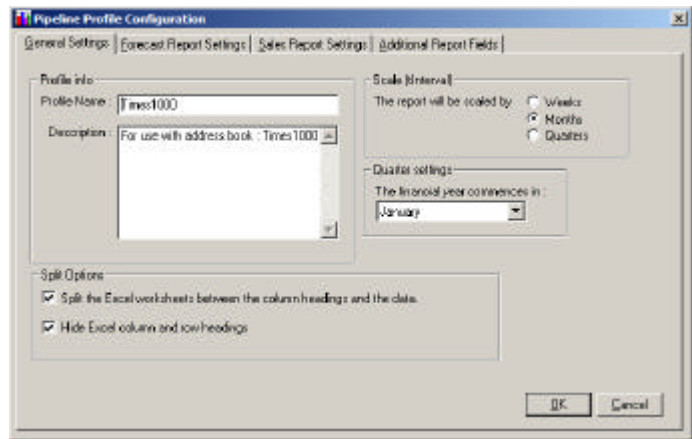
Create and Save Profiles
Report profiles can be configured and saved to meet your requirements.

Define Reporting Period to suit your business in Weeks, Months or Quarters. *(V2)*

Share Profiles with colleagues. *(V2)*
The profile for generating a report can be exported and imported, allowing you to share the same report template through-out the sales team.
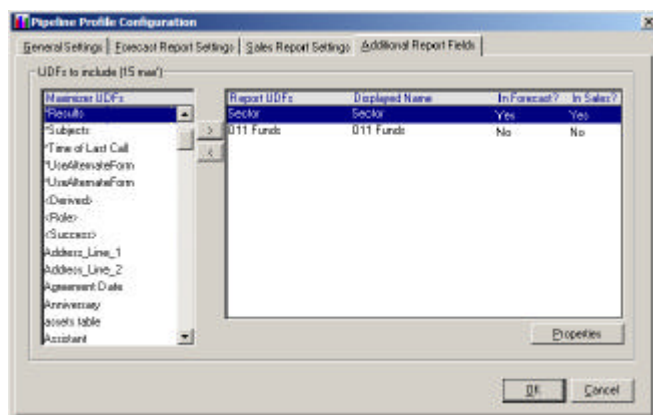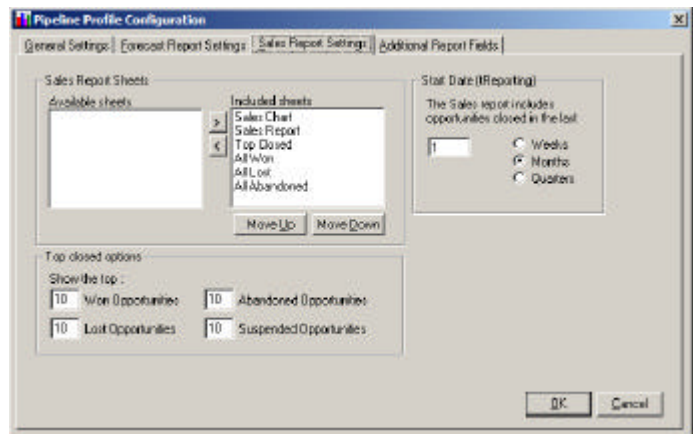
New in V2: you can **specify Which pages to include in the Forecast report,** and you can specify your own order for the report pages to appear in the workbook.

For the Forecast summary pages you can specify the number of summary opportunities displayed.

You can also **design your sales report** in a similar way, deciding which pages you would like in the final report.

New in Version 2: there is a pivot analysis and chart of your teams sales performance and easier control of the reporting period used.

In each report you can **choose additional reporting fields** just by choosing them from a list. Your report can include:

♦ UDFs from the Opportunity
♦ UDFs from the Company
♦ Address Fields (e.g. Country) *V2*
♦ Roles (Contact Name) *V2*
♦ Success Factors (Score) *V2*
♦ Fields derived from SQL *V2*
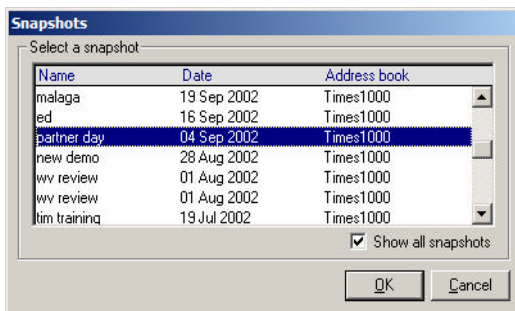♦ Fields derived from a VBScript *V2*

Comparative Reporting

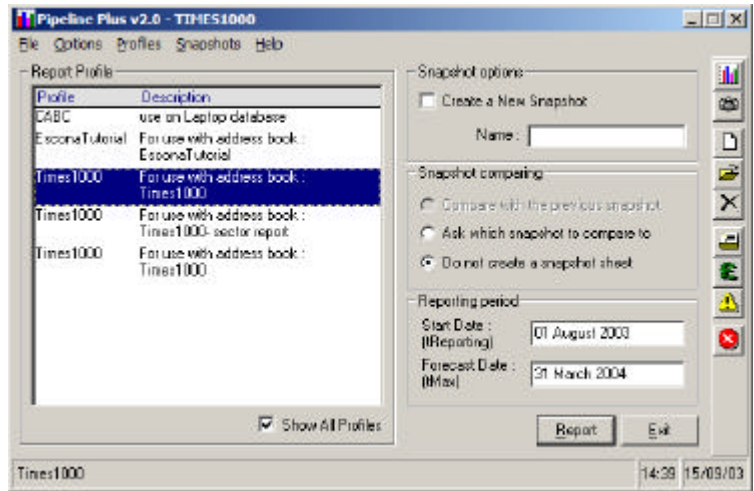Pipeline Plus enables you to save an unlimited number of snapshot reports.

As the name suggests, a current snapshot of all opportunities is taken and then saved with its date and your preferred description.

This enables you to capture your sales progress at various given moments (you may find it useful to carry this process out at the end of every month, for example).

When you produce a report you can select any previous snapshot to be used for comparison.

In the report, **colour is used to highlight the changes that have occurred in the pipeline** since your snapshot was created. This report page makes it very quick and easy to focus on the activity that has occurred since you created your last report.

If more than one snapshot has been saved, you then have the option of either comparing with the most recent snapshot or selecting an alternative from a list of snapshots created at earlier dates.

Alerts

The Alerts option highlights all the opportunities excluded from your forecast report because the data is either out-of-date or incomplete.

This includes opportunities which have passed their close date, and any fields which have not been completed, such as opportunity probability, for example.
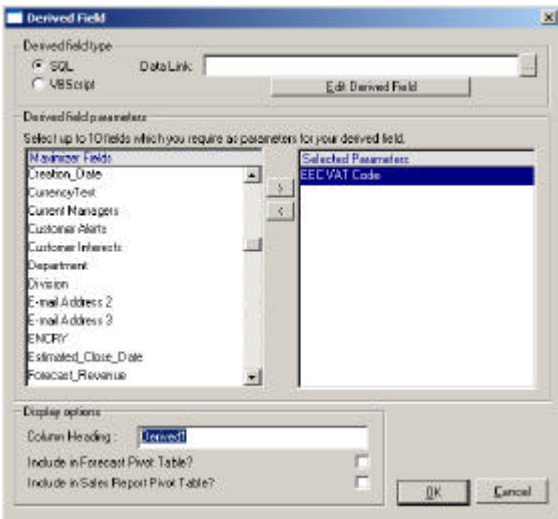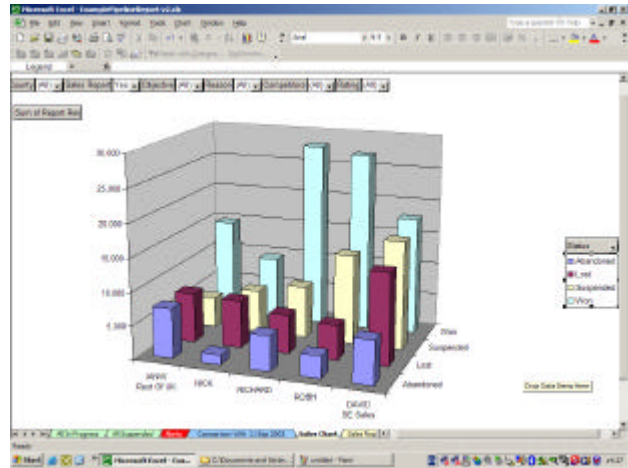
All reports are presented in Microsoft Excel, allowing you the freedom to perform further analysis in the tool most managers know best for monthly reporting. All Pipeline Plus reports include a workbook page with all the source data for you to work with directly if you so require.

The **Forecast Report Chart and Pivot table** make it easy for you to investigate the state of your sales pipeline. You can view the projection with either weighted or unweighted revenues, and you can get Pipeline Plus to perform a currency roll-up for you if required.

Your Company Sales Pipeline

County	(All)
Rating	(All)
Sales Person	(All)
Team	(All)
New	(All)

| Sum of Weighted Rev | % | | | | | | | | | |
Estimated Close Date	90-100	80-89	70-79	60-69	50-59	40-49	30-39	20-29	10-19	0-9	Grand Total
31/10/2003	6160	5025	6370	1250		1350	1340				21,495
30/11/2003			3960	5170		2400	2050				13,580
31/12/2003					3200	5404		960			9,564
31/01/2004			3360		1000						4,360
Grand Total	6160	5025	13690	6420	4200	9154	3390	960			48,999

The New Sales Report Analysis in Version 2 makes it easy for you to compare the performance of your sales team. Complete with a pivot table analysis, it enables you to analyse your sales by any of the report fields.

Powerful Integration Capabilities
Derived fields are a new feature in V2 and enable you to make on-the-fly interrogations of other data sources as your report is built.

For example, an **SQL Derived field** could be used to access your MRP system so as to insert production information into the report for each won opportunity, or it could access your accounts system to show recent sales data.

VBScript fields allow you to manipulate data from Maximizer to create grouping or other types of report fields as needed.

Derived fields can be passed other report field values as parameters.

Please Note: Minimum requirement for Pipeline Plus is Excel 97.
Recommended versions of Microsoft Excel are 2000 and XP.

To order your copy of *Pipeline Plus* contact your Maximizer reseller at: