

Enterprise - How to Utilize the Sales Pipeline

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[Daily Webinar - How to Setup and Utilize the Sales Pipeline](#) from TempWorks Training on Vimeo.

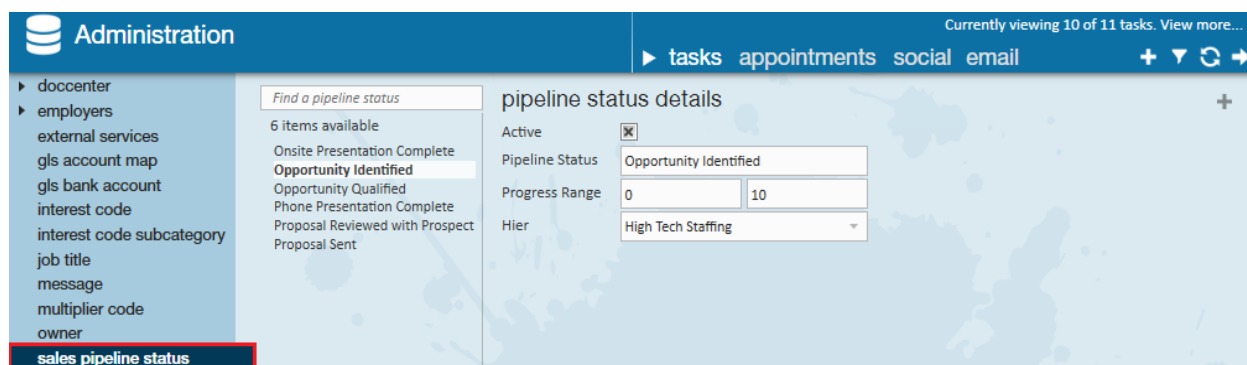
For best viewing quality, expand the *HD* option, and select 1080p:



The sales pipeline allows users to track the sales progress of their prospect and target customers in Enterprise. Additionally, the sales pipeline functionality can be customized to match your company's terminology and, when a customer is ready to sign a contract, that contract can be generated directly within their customer record with just a few simple clicks.

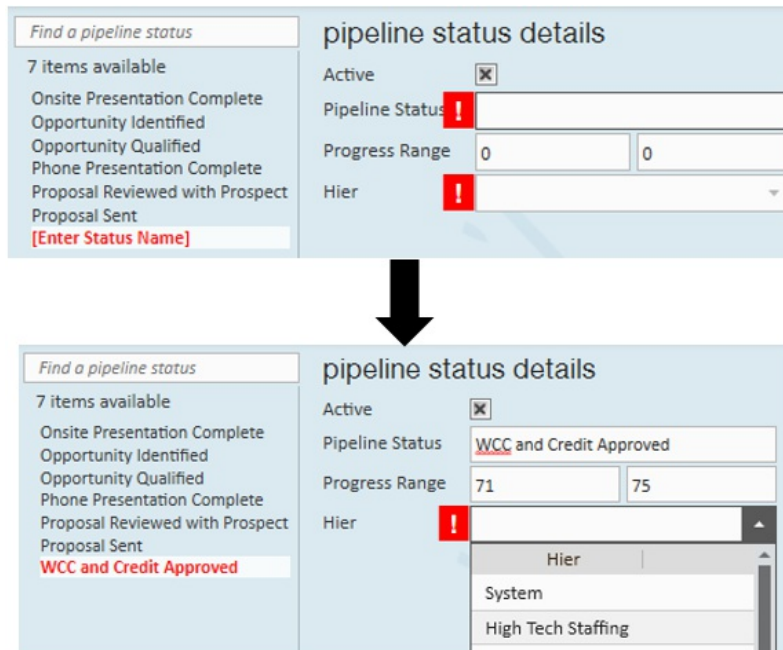
Setting up the Sales Pipeline

To get started, navigate to the administration section of Enterprise and select "sales pipeline status" from the list of options on the left.



You will then need to add pipeline statuses and assign each status a progress range in the form of a percentage. This percentage is simply an estimate as to how close you are to signing a contract with this customer/winning their business. In our example, the first pipeline status is "Opportunity Identified" which has a progress range of 0 to 10.

To add a pipeline status, select the + icon in the upper right corner of your screen. You will then be required to give the new pipeline status a name, and a location in your hierarchy.

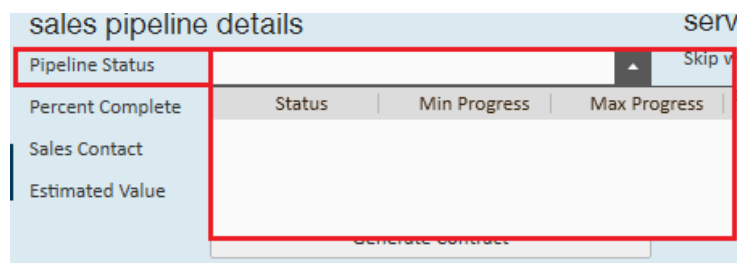


Once you have successfully setup your pipeline status details in administration, you can verify the statuses are displaying correctly by navigating to a customer record > details > sales & service. Then, simply select the *Pipeline Status* drop-down:

sales pipeline details

Pipeline Status

Status	Min Progress	Max Progress
Opportunity Identified	0	10
Opportunity Qualified	11	20
Phone Presentation Complete	21	30
Onsite Presentation Complete	31	50
Proposal Sent	51	60
Proposal Reviewed with Prospect	61	70
WCC and Credit Approved	71	75

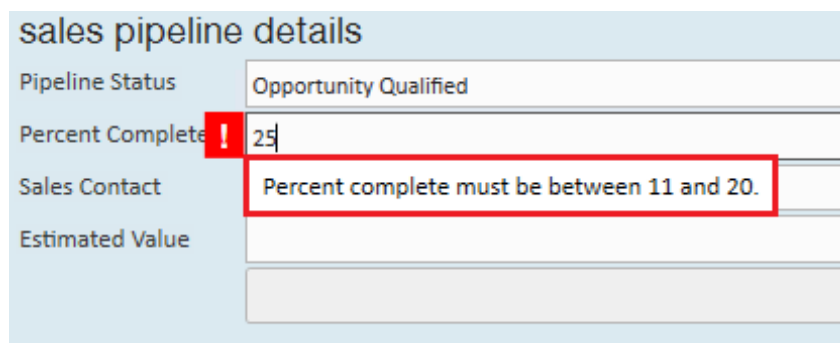


Note Until you've established your sales pipeline statuses in administration, the corresponding drop down in the customer record will be blank as shown.

Utilizing Sales Pipeline

The sales pipeline details can be used throughout the entire sales process to track progress with target customers. To begin, navigate to the sales & service on a customer record.

Select a pipeline status that best describes your relationship with the customer. Careful! If you input a percentage that is above the max progress, Enterprise will require you to update the percent complete:

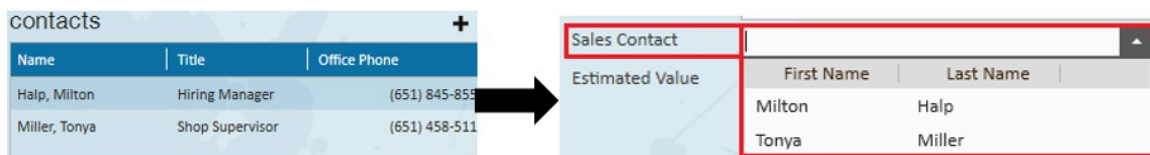


The screenshot shows a form titled "sales pipeline details" with the following fields:

- Pipeline Status: Opportunity Qualified
- Percent Complete: 25 (with a red exclamation mark icon to the left)
- Sales Contact: A dropdown menu with an error message: "Percent complete must be between 11 and 20."
- Estimated Value: (empty)

Upon selecting a status, Enterprise will automatically pre-fill the percent complete field with the minimum progress percentage. This can be updated accordingly by you.

Note that the sales contacts that are displayed in the drop-down are those same contacts that have been added to the related customer/department record:



The diagram illustrates the relationship between a "contacts" table and a "Sales Contact" dropdown menu. An arrow points from the "contacts" table to the dropdown menu.

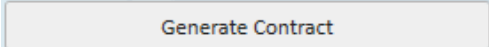
Name	Title	Office Phone
Halp, Milton	Hiring Manager	(651) 845-855
Miller, Tonya	Shop Supervisor	(651) 458-511

The "Sales Contact" dropdown menu is shown with the following options:

First Name	Last Name
Milton	Halp
Tonya	Miller

If you are inputting an estimated value, you will also be required to associate a frequency of that value.

In our example, we have entered an estimated value of \$3,000 per week.

Once done, select the  button, this will open the "generate contract" wizard:

The generate contract form should look familiar as it is nearly identical to the rate sheet form. It is also crucial to note that multiple contracts can be generated for the same customer. For example, what if my bill rate for Accountants is substantially different than my bill rate for Forklift Drivers? In that case, it would serve me best to generate two separate contracts.

The only required field is the multiplier code. That codes that display in the dropdown will mirror the codes that have been added to the defaults section of that same customer record:

Customer Defaults Page:

multiplier codes

Use Customer Specific Settings

Apply Multiplier Codes to Departments

Code	Priority	Default Set By
1.45	1	Customer
1.5	2	Customer
1.3	3	Customer
None	4	Customer



Generate Contract Form:

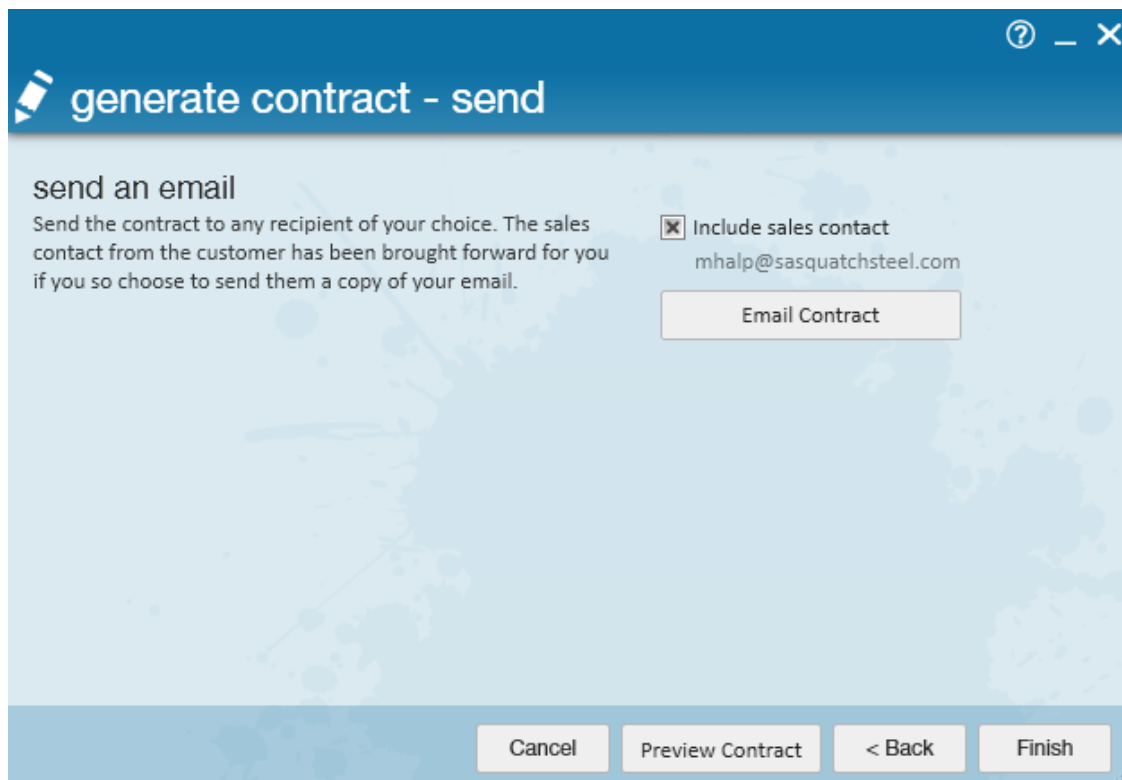
Multiplier Code	1.5			
Worker Comp Code	Code	Reg	OT	DT
Estimated Markup	1.3	1.3000	1.5000	1.5000
	1.45	1.4500	1.3500	1.4500
	1.5	1.5000	1.5000	1.5000
	None	0	1.5000	2.0000

Cancel

Once you have entered in all the details for your contract, you can preview your contract by selecting the *preview contract* button. If everything looks good, select *next* to continue.

Note There is not a generic contract layout available in Enterprise. Please contact your Account Manager or TempWorks Support to have your contract setup and available to generate.

You can also send the contract as an e-mail to the sales contact you included on the generate contract form in the previous step by selecting to *email contract*:



Note If that contact does not have an e-mail address saved to their record you will not be able to e-mail the contract.

After the contact has been e-mailed successfully, simply select the *finish* button. The contract will then be saved as a document in the documents page of the customer record for future reference and access.

Additionally, the contract will also be saved as a rate sheet within the defaults section of the customer record. This way, whenever an order is created with details that match the criteria you had entered for your contract, you know with 100% certainty that the correct mark-up, bill rate, and pay rate will be applied.

Customer	Department	Work Site	Employee	Job Title	Branch	Shift	Bill	Pay
Sasquatch Steel	Manufacturing	St. Paul		Forklift	Any	Overnight	\$18.00	\$12.00

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