Enterprise - How to Setup Sales Pipeline Statuses

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What is the Sales Pipeline?

The sales pipeline allows users to track the sales progress of their prospect and target customer accounts in TempWorks Enterprise. Additionally, the sales pipeline functionality can be customized to match your company's terminology. Check out Enterprise - How to Utilize the Sales Pipeline for more information.

Note Until the sales pipeline statuses are set up in administration, the sales pipeline field on the customer record will be blank.

Setting Up Sales Pipeline Statuses

To set the levels of the sales pipeline navigate to administration \Rightarrow sales pipeline status:

Administration	
interest code interest code subcategory interview questionnaire job title message multiplier code owner required document sales pipeline status sales team sec roles service rep tag type task admin timeclock punches web user account worker comp code	aca administration applicant assignment broadbean calendar contact contact groups contact groups contact messages customer dispatcher email employee evaluations
employee customer order assignment contact pay / bill calendar reports	hot lists hrcenter integrations job candidates order pay / bill rate sheet reports resume parser task manager vendors webvisit
all options 🔹 🕨	worker comp

Click the plus button (1.) to add a new status:

Administration			► tasks	appointments	ntly viewing 0 of 61 tasks. Vie	w more V C →
gls account map gls bank account hrcenter doc mapping imputed income paycode interest code interest code subcategory job title message multiplier code owner required document sales pipeline status	Overcoming Objectives	Active Active Pipeline Status Progress Range Hier	atus details Image: state sta	ified 15 v	1.	. +

Add pipeline statuses, assign progress ranges, and set where in the hierarchy each status should be accessible:

Pipeline status: Use the preferred verbiage to describe this level of the pipeline.

Some examples:

- Opportunity identified
- No opportunity
- Opportunity qualified
- Proposal sent
- Contract in hand

Progress range: This will associate a numeric level of the pipeline to each status. This may be on any scale desired.

Some examples:

- 1-10
- 1-100
- 0%-100%

Hier: Select where in the hierarchy this sales pipeline status should be available. Some examples:

- System level the status will be available to all branches and service reps
- Entity level the status will be available to all branches and service reps within that entity (i.e. company)
- Branch level the status will only be available to service reps within the selected branch

Note The hierarchy levels displayed in your hier field have been customized to your company's hierarchy and may include additional levels such as:

- District
- Area

• Class vs. temp

Once pipeline statuses have been setup and saved, your sales team will be able to use them on the customer record.

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