

# Long sales

## Sales pipeline

Version 7.17



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# Sales pipeline

PRODUCTS: SALES ENTERPRISE

**Sales pipeline** helps you analyze the deals to timely detect the bottlenecks in the sales department operation and react accordingly. You can estimate the conversion rate between stages, pipeline completeness, and compare pipelines of individual managers or sales teams.

## Set up the sales pipeline


By default, the pipeline displays the following stages:

1. Qualification.
2. Presentation.
3. Proposal.
4. Contracting.
5. Closed won.

**Note.** By default, the “Canceled lost” stage is not displayed in the sales pipeline.


You can include certain stages in or exclude them from your pipeline. Set up the way the stages are displayed in the [ *Opportunity stages* ] lookup. The [ *Number* ] field in the [ *Opportunity stages* ] lookup determines the stage order. Learn more: [Set up opportunity stages](#).

To set up the display of opportunity stages in the pipeline:

1. Open the System Designer by clicking .
2. Open the [ *Lookups* ] section.
3. In the “Opportunities” lookup folder, open the [ *Opportunity stages* ] lookup.
4. For the opportunity stage to be displayed in the sales pipeline, select the [ *Y* ] checkbox in the [ *Display in pipeline* ] column. To exclude a stage from the sales pipeline, leave this checkbox unselected.
5. Save the changes.

## Read the sales pipeline

To open the sales pipeline:

1. Open the [ *Dashboards* ] view in the [ *Opportunities* ] section by clicking .
2. Go to the [ *Sales pipeline* ] tab or the [ *Compare pipelines* ] tab.

On the [ *Sales pipeline* ] tab, you can see the analytics about distribution of opportunities by stages.

The diagram element's height corresponds to the number of opportunities with an up-to-date status.

Opportunities with “Closed lost,” “Closed won,” “Closed rejected,” and “Closed rerouted” statuses are not taken into account.

Select the pipeline slice you need to analyze:

- **The number of opportunities** displays how opportunities that started during the specified time period are grouped by stages by the end of that period. For example, the “Qualifications” displays the number of opportunities, which have the “Qualification” stage specified on the [ *Stages* ] detail, and this opportunity falls within the selected time period.
- **Stage conversion rate** displays the percentage of opportunities that moved from one stage to another stage during the specified time period. The diagram displays all opportunities that have records for the selected period on their [ *Stages* ] detail. The value of the conversion rate is calculated as the ratio of the current stage to the previous one. For example, on the “Presentation” stage, the number of sales in the pipeline is 10. The stage conversion is 100% The number of sales on the “Proposal” stage is 4. The stage conversion rate is calculated as the ratio of the “Proposal” stage to the “Presentation” stage multiplied by 100%. In our example, the “Proposal” stage conversion rate is 40%.
- **To the first stage** — the diagram shows the percentage of leads that moved to the “Qualification” stage. The sales percentage on the “Qualification” stage is always at 100%. For example, on the “Qualification” stage, the number of sales is 10. At the “Presentation” stage the number of sales is 5. The stage conversion rate of the “Presentation” stage is calculated as the ratio of the “Presentation” stage to the “Qualification” stage multiplied by 100. In our example, the “Presentation” stage conversion rate is 50%.

## Compare the sales pipelines

The [ *Pipelines comparison* ] tab displays two dashboard components: “Sales pipeline - filter” and “Sales pipeline by company.” The “Sales pipeline - filter” involves filters settings, whereas the “Sales pipeline by company” does not. You can additionally set up a filter by period for each of these pipelines.