

Pipeline Plus Version 2.5

Sales Management Tool for Maximizer

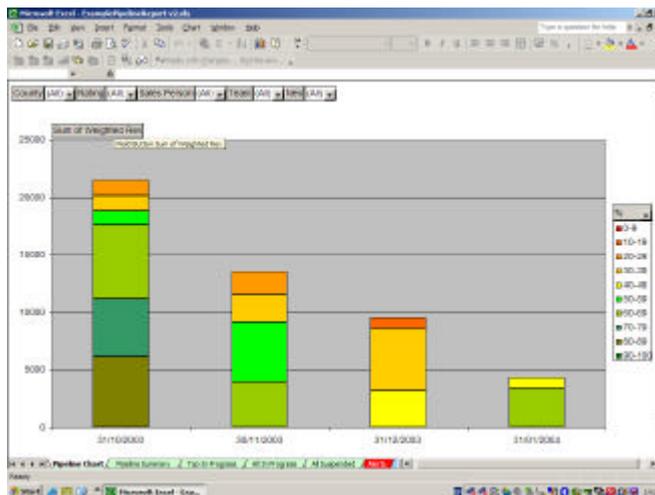
Understand the sales performance of your company!

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.

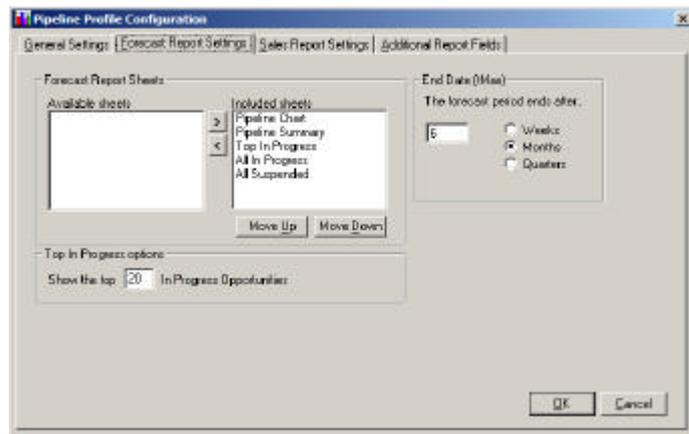
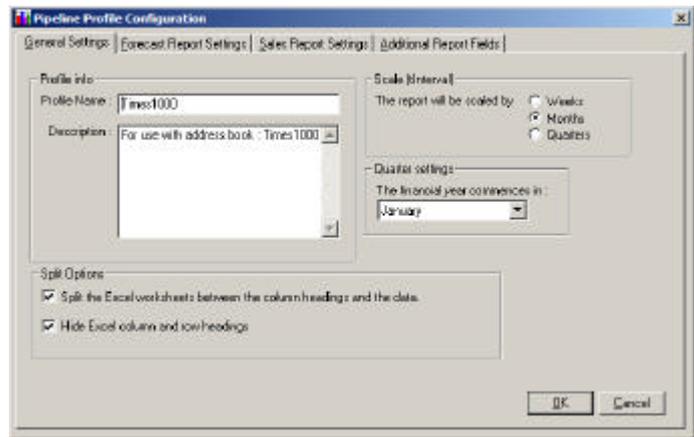
Create and Save Profiles

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 throughout the sales team.

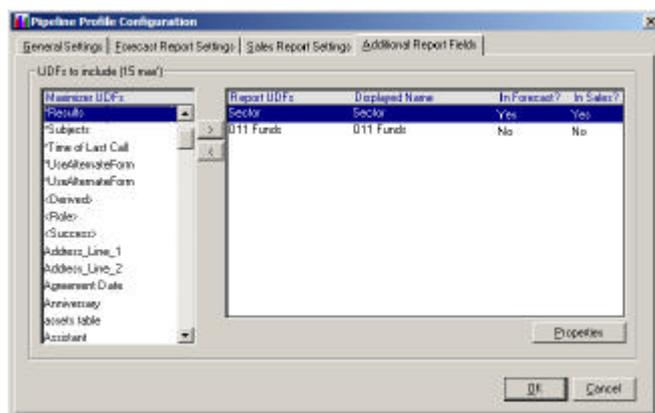
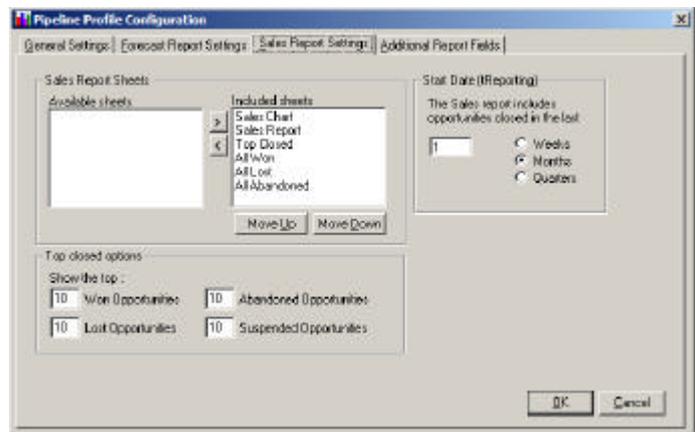


New in V2: you can specify **Which pages to include in the Forecast report**, and you can specify your own order for the report pages to appear in the workbook.

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**

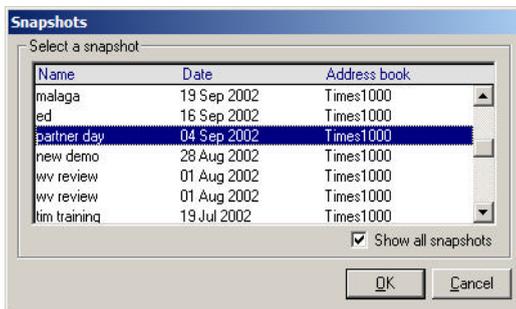
Comparative Reporting

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

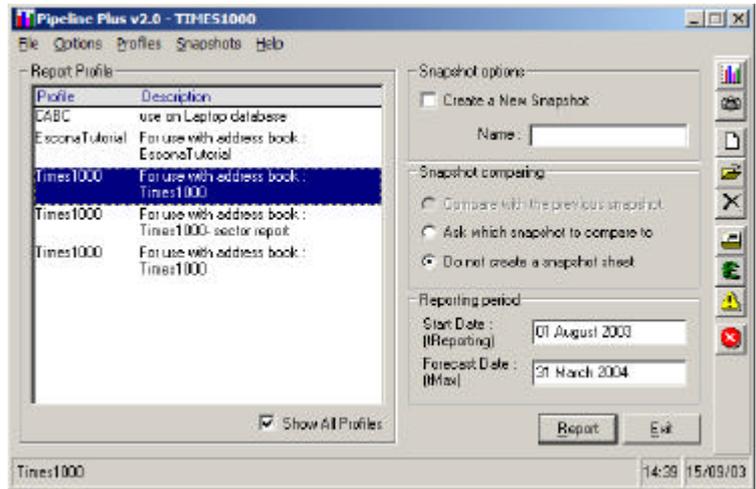
As the name suggests, a current snapshot of all opportunities is taken and then saved with its date and your preferred description.

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.



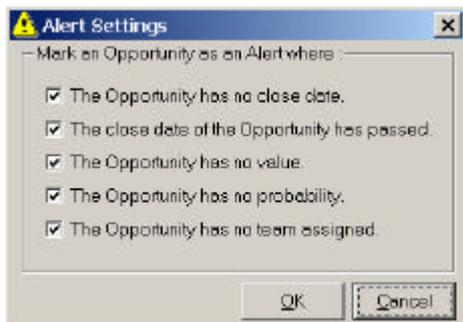
If more than one snapshot has been saved, you then have the option of either comparing with the most recent snapshot or selecting an alternative from a list of snapshots created at earlier dates.

Updated	Customer	Teams	Sales Person	Teams	Sales Person	Objective	Objectives	Status	Status	Forecast %	Rat
Yes	ISA International Plc	WARW	WARW	IMWV	IMWV	Sell 16 deals	Sell 10 deals	Suspended	Suspended	5.000	06 All
Yes	Facenada Holdings Ltd	Rest Of UK	WICK	IMWV	IMWV	Take over management of network	Take over management of network	Win	In Progress	1.000	8 Mar
Yes	Morthumbrian Water Group Plc	MASTER	MASTER	MASTER	MASTER	Annual Run	Annual Run	In Progress	In Progress	6.000	06 All
Yes	C.E. Health Plc	MASTER	MASTER	MASTER	MASTER	New Network Sale	New Network Sale	In Progress	In Progress	6.000	02 Pro
Yes	BAGF Ag	MASTER	MASTER	MASTER	MASTER	New Network Sale	New Network Sale	In Progress	In Progress	3.000	8 Mar
Yes	Detish Vita Plc	MASTER	MASTER	MASTER	MASTER	New Network Sale	New Network Sale	In Progress	In Progress	3.000	8 Mar
Yes	Allied Lyons Plc	Rest Of UK	WARW	Rest Of UK	IMWV	Project	Project	Win	Win	4.000	05 All
Yes	C.E. Health Plc	Rest Of UK	WARW	Rest Of UK	IMWV	Project	Project	Suspended	Suspended	4.000	08 Pro
Yes	A. Medical Ag	Rest Of UK	WARW	Rest Of UK	IMWV	New Network Sale	New Network Sale	Abandoned	In Progress	6.000	36 Mar
Yes	C.E. Health Plc	Rest Of UK	WARW	Rest Of UK	IMWV	New Network Sale	New Network Sale	Abandoned	Abandoned	1.000	48 If Lu
Yes	A. Cohen & Co Plc	Rest Of UK	WARW	Rest Of UK	IMWV	New Network Sale	New Network Sale	Lost	Lost	7.000	8 Mar
Yes	Mansanto Co	Rest Of UK	WARW	Rest Of UK	IMWV	New Network Sale	New Network Sale	Win	Win	11.200	6 Mar
Yes	A. Allstrom Oy	Rest Of UK	WICK	Rest Of UK	WICK	New Network Sale	New Network Sale	Win	Win	5.000	75 Pro
Yes	Search & ...	Rest Of UK	WICK	Rest Of UK	WICK	New Business	New Business	Suspended	Suspended	4.000	76 Pro

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.



Team	Sales Person	Customer	Objective	Status	Estimated Close Date	Close Date	Forecast	Actual	Weighted Rev %	Competitors
MASTER	MASTER	C.E. Health Plc	Annual Run	In Progress	31/02/03		4,500	0	4,287	00
MASTER	MASTER	Detish Vita Plc		In Progress			3,000	0	0	00
MASTER	MASTER	BAGF Ag	New Network Sale	In Progress	31/02/03		6,400	0	3,849	60
Rest Of UK	WARW	A.G. Bar Plc		In Progress	31/01/04		2,900	0	0	00
Rest Of UK	RICHARD	Stagecoach	New Front office system	In Progress	30/11/03		11,000	0	0	00
Rest Of UK	ROBH	Mnest Group Plc	Simple Operation	In Progress	30/09/03		5,900	0	4,019	65
Rest Of UK	ROBH	Daewoo UK Ltd	New Network Sale	In Progress			4,900	0	0	00
Rest Of UK	ROBH	C.E. Health Plc	New Website	In Progress			2,900	0	0	00
Rest Of UK	ROBH	SAA Plc	Take over management of network	In Progress	31/02/03		4,900	0	0	00
Rest Of UK	ROBH	Argon Press Ltd	Grant Possibility	In Progress			10,900	0	0	00
Rest Of UK	ROBH	Allott Fisher Group Plc (The State Company Plc (The	Simple Install	In Progress	31/02/03		0	0	0	00
SE Sales	DAVID	New Front Office system		In Progress	30/09/03		17,500	0	8,083	45
SE Sales	DAVID	A.G. Bar Plc	Sell new center	In Progress			0	0	0	00

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.

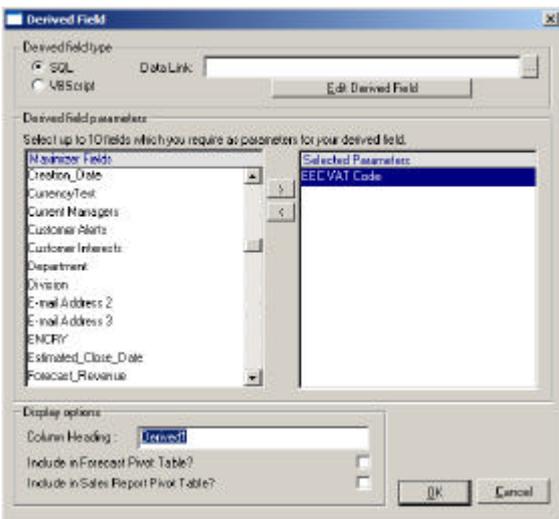
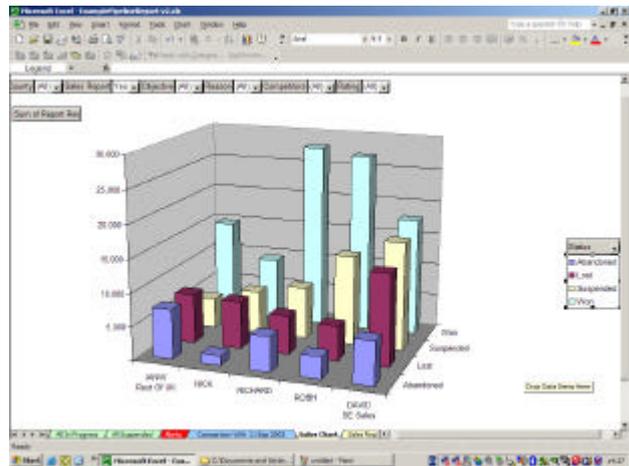
The **Forecast Report Chart and Pivot table** make it easy for you to investigate the state of your sales pipeline. You can view the projection with either weighted or unweighted revenues, and you can get Pipeline Plus to perform a currency roll-up for you if required.

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.

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