

Sales Automation

Redcastle

Application Datasheet:

Pipeline.net for SuperOffice CRM

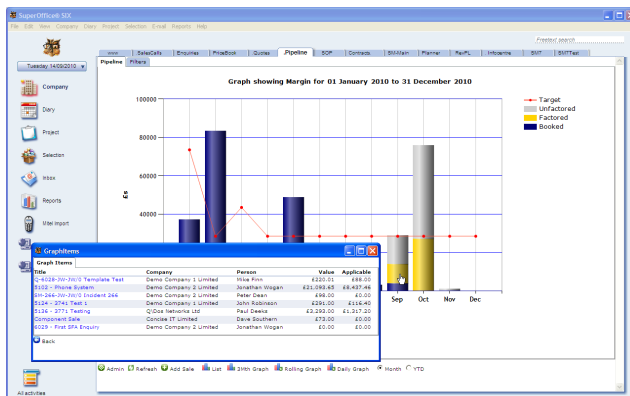
Managing your own sales activity or your sales team's activities is made much easier with the introduction of Pipeline.net. You can now take a broader view on sales forecast information and the activities associated with each opportunity recorded in SuperOffice CRM. You can see how you or your team are performing against plan - check what the figures are looking like for the next three month window. Make sure that you are not neglecting any of your accounts - monitor the history of a sale - know what to do next - at a glance.

Sales Management simplified

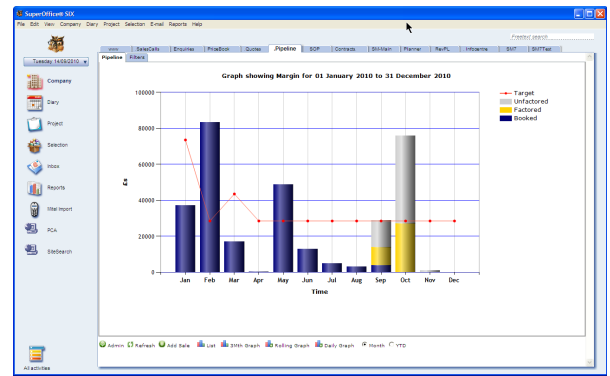
Many organisations use spreadsheets to 'manage' all of their sales opportunities. With all of the last-minute phone calls and emails - then the copying and pasting of updates before the sales meeting starts - yes we have all done it (!) - keeping up to date with our sales forecasts can become a logistical nightmare! Making a change in SuperOffice CRM is reflected, without any of the "manual intervention", in Pipeline.net - so the graphs and the figures add up - all of the time, every time.

View what you need, when you need it

Pipeline.net has extensive filtering options, view sales forecast information by period - month, quarter, year or from/to dates and filter those periods by forecast date, registered date or



next action date. Sales forecasts without a next action! of course their shouldn't be any, but just in case there are - see them all in one view! Check all of the forecast by sales group, sales person, probability, competition, category, status and source - and in any combination. In addition view the figures and graphs based upon those filter options.



Sales activity management

Pipeline.net simplifies the association of sales activities to sales forecast information, and also links to SuperOffice CRM projects if required. Any SuperOffice CRM activity or forecast can be edited from within the Pipeline.net environment. It is also very easy to track all of the activity history associated with each opportunity and see a graphical representation of the history of the sale. Drill-down into the Performance graph to interactively review and update the content.

Configured to suit your requirements

The Pipeline.net configuration tool allows you to tailor the way that Pipeline.net looks and works to match your needs and is totally integrated within the SuperOffice CRM web panel interface.

Date	Next Action	Customer	Sales Header	ID	Amount	High	Rate	Forecast	Age
15/08/2010		Demo Company 1 Limited	Q-4439-302010 Telephone Test	3070	6220	680	Quoted	£224.40	69
15/08/2010		Demo Company 1 Limited	5102 - Phone System	3100	651,088	68,487	Quoted	£18,850.00	14
24/08/2010		Demo Company 2 Limited	51124-302010 Incident 246	3100	486	0	Quoted	£0.00	101
24/08/2010		Demo Company 1 Limited	5114 - 3746 Test 1	3100	2236	118	Quoted	£860.76	147
30/08/2010	LA 09/2010	Demo IT Limited	Completed Sale	3070	670	0	Completed	£0.00	14
30/08/2010	LA 09/2010	Q-Data Networks Ltd	5114 - 3774 Training	3070	42,200	61,317	Quoted	£4,387.00	137
20/09/2010	5102-302010	Demo Company 2 Limited	6102 - First 3746 Enquiry	3100	60	0	Quoted	£0.00	14

For more information on Pipeline.net

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