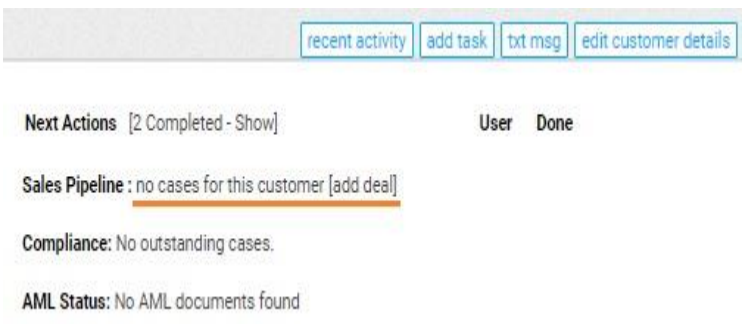
Sales Pipeline

How to Use The Sales Pipeline on The BIS Platform:

- Login to The BIS Platform & go to the Sales menu
- Click Sales Pipeline - This will bring you to a page showing all your pipeline cases / deals (if previously entered)
- To add a new pipeline case, click “Add Deal” in the tasks / actions panel on the right of the screen.
- Enter the details of the pipeline case such as the Deal Name, Deal Type, Deal Source, Deal Status, Deal Value and Deal Certainty then click “Save Deal” in the tasks / actions panel.
- Please note that in your User Preferences under the Tools menu, you can customise a number of the dropdown lists including Deal Type, Deal Source and Deal Status.
- Your active deals are shown on the screen below the graphs, and you can filter what is displayed (including deal owner, deal type etc)
- To update or edit a deal, click on the deal when highlighted under “Active Deals” and update accordingly, not forgetting to click save when you have made your changes.
- When your deal / case is completed, return to the deal and choose an outcome.
- Any notes entered on the deal in the Deal Notes box will transfer to the client history when the case is closed.
- All completed deals / cases can be viewed by clicking “Show Closed Deals” under tasks / actions on the Sales Pipeline screen, or can be downloaded into Excel by clicking “Export to Excel (Closed)”
- You can access the Sales Pipeline from the customer record where it will show any deals existing for that customer in the pipeline.
- As mentioned in our tip, this section in the customer profile will now also include a feature allowing you to “[Add Deal]” or “[Add Another Deal]” (as shown below)
- When selected, this “Add Deal” / “Add Another Deal” link will bring you to a new deal page where you can complete the steps to add you deal for that client.
- If another deal is added, this deal will then appear both in your Sales Pipeline and in the client file.

No Cases for Customer [Add Deal]



Existing Cases [Add Another Deal]

