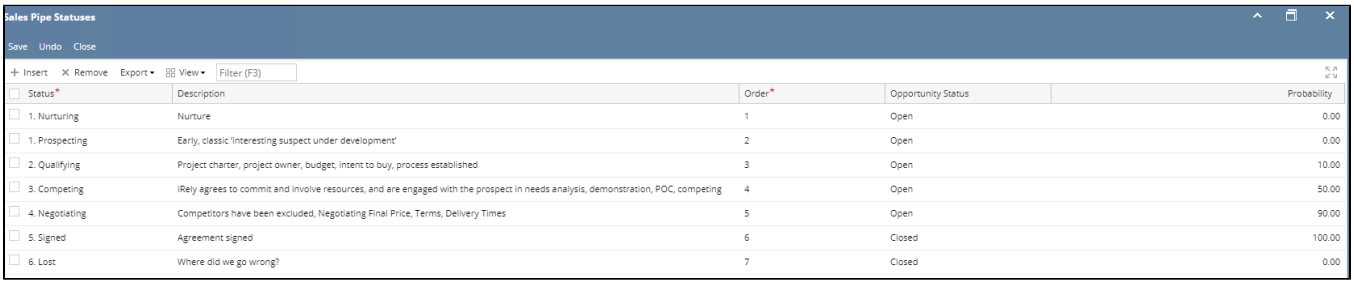
Create Sales Pipe Status

1. From **CRM** module, click **Sales Pipe Status**. Sales Pipe Status screen will appear.



Status*	Description	Order*	Opportunity Status	Probability
1. Nurturing	Nurture	1	Open	0.00
1. Prospecting	Early, classic 'interesting suspect under development'	2	Open	0.00
2. Qualifying	Project charter, project owner, budget, intent to buy, process established	3	Open	10.00
3. Competing	iRely agrees to commit and involve resources, and are engaged with the prospect in needs analysis, demonstration, POC, competing	4	Open	50.00
4. Negotiating	Competitors have been excluded, Negotiating Final Price, Terms, Delivery Times	5	Open	90.00
5. Signed	Agreement signed	6	Closed	100.00
6. Lost	Where did we go wrong?	7	Closed	0.00

2. To add new Sales Pipe Status, go to the next available row or click Insert button.

3. Provide ****Status***, Description, ****Order,*** Opportunity Status & Probability.

(Status should be unique)

4. Click **Save** button to save the data.

**user can add multiple Sales Pipe Status as long as the Status is unique.*

***text** - denotes required field to create Sales Pipe Status*