Multiple Sales Pipeline

ZOHO CRM

READ ME

This document is intended only for internal use and may not be distributed externally or reproduced for external distribution in any form without express written permission of Zoho Corporation Pvt. Ltd.

Table of Contents

What is a sales pipeline?

A sales pipeline is a visual representation of your sales process that shows where your prospects are in the buying cycle, how many open deals you have, how long a particular deal stayed in each stage, and whether you have a good chance of winning a deal.

While the sales processes followed in different businesses won't be the same, they all tend to use similar stages. The main aims of any sales process are identifying and acquiring leads, getting in touch with them to understand their requirements, analyzing and presenting an offer, and finally closing the deal. Though, in reality, every deal progresses differently. For example, sometimes you will find prospects who are so interested in buying that they skip several of the stages and jump right to closing the deal while others may slowly progress towards the buying stage. Regardless of these differences, it is still helpful to create a general sales pipeline that helps you keep track of every deal.

Sales pipeline for deals

In any sales process, a deal has to pass through several stages until it is closed or lost. To make sure that deals are not left stagnating in the same stage unnecessarily, the sales team needs to keep a close watch on their deals pipeline. Our Deals module contains different stages including qualification, value proposition, negotiation, and closed won that appear in a typical sales deal pipeline. These stages are available in a picklist field called Stage. You can add as many stages as you like to the existing pipeline to reflect your sales process accurately. Here are some of the ways a sales rep can benefit from a sales pipeline:

- Visualize and track the progress of a deal through each stage
- Take necessary actions based on the stage in the buying cycle
- Monitor how long a particular deal has stayed in a stage and take action to prevent stagnancy

The need for multiple sales pipelines for deals

Zylker Cars is a car dealership company that has different sales processes for reselling used cars, selling new cars, and providing car servicing. Some of the basic sales stages will be similar across these three processes, but there will also be significant differences. The flow chart below shows the different deal stages for each process:

New Cars	Used Cars	Service Requests
Gathering requirements	Show available models	Request analysis
Test drives and car selection	Test drives and car selection	Repair process (ongoing)
Price quote	Price quote	Quality check and test drive
Negotiation	Negotiation	Bill generation
Closed won/lost	Closed won/lost	Service request/closed

As every process is different, putting all the deals through a single pipeline will not give a clear understanding of their progress. Therefore, Zylker Cars needs to create multiple sales pipelines to more accurately show how a deal is progressing.

Feature availability

Users with the *Module Customization* profile permission can create, edit, and delete pipelines. The number of pipelines you can create depends on your CRM edition. The following limits include the standard pipeline created with the Stage field in the Deals module.

- Standard: 5 pipelines
- Professional: 10 pipelines
- Enterprise: 20 pipelines (irrespective of the layout)
- Ultimate: 50 pipelines (irrespective of the layout)
- Developer Edition: 3 pipelines
- For all trial Editions: 3 pipelines

Creating multiple sales pipelines

The Stage field available by default in the Deals module, with system-defined stages such as: qualification, need analysis, value proposition, etc.

Standard pipeline

When you create a pipeline for the first time, we will create a system-defined standard pipeline and associate all the records in the Deals module with it. This is done to make sure that every deal is associated to at least one pipeline.

The standard pipeline will be created with the stages that are present in the Stage picklist field.

You can rename and customize this pipeline to meet your requirements. The standard pipeline will not be created if you do not have any records in the layout or if there is no Blueprint created for the Stage field.

Layout specificity

Pipelines are layout specific and you can create multiple pipelines for each layout. For example, you have a layout for sales and are selling two categories of products, furniture and furnishings, which have different sales processes. You can create two pipelines in the Sales layout, one for each category.

Moving a deal from one pipeline to another

The Deals module has a Stage field which is used for the default pipeline. If you create multiple pipelines in a layout, you can move a record from one pipeline to another manually (within the layout). You can also use the Mass Update feature to move a batch of records at once.

Probability value of a stage

Each stage in a pipeline will be assigned a probability value. If you are using the same stage in different pipelines, the same value will be used

When you create a new pipeline, you can create new stages and assign probability values to them, but you cannot modify the probability for the existing stages from the pipeline creation screen. You need to go to *Stage Probability Mapping* to change the probability for other stages.

If you set the forecast category to Pipeline, Closed, or Omitted in *Stage-Probability Mapping* then the deal stage will be Open, Closed Won, or Closed Lost respectively.

Stage-Probability Mapping - Standard Layout

STAGE NAME	PROBABILITY (%)	FORECAST TYPE	FORECAST CATEGORY
Qualification	10	Open	Pipeline
Needs Analysis	20	Open	Pipeline
Value Proposition	40	Open	Pipeline
Identify Decision Makers	60	Open	Pipeline
Proposal/Price Quote	75	Open	Pipeline
Negotiation/Review	90	Open	Pipeline
Closed Won	100	Closed Won	Closed

+ From Unused Values   Cancel   Save

To create a sales pipeline

1. Go to Setup > Customization > Pipelines.

2. Click New Pipeline.

3. Enter a name and select the Layout to associate the pipeline with.

4. Add the **Stages** to the pipeline.
   The default values from the Stage field from the standard layout will be

available to choose from.

Create Pipeline

Pipeline Name	New Cars
Layout	Standard ▾
Stages	Requirement gathering × Test Drive and Car Selection × Proposal/Price Quote × Negotiation/Review × Closed Won × Closed Lost ×
Set as Default	☐

Cancel   Save

5. In the *Stages* option, click the **Create New Stages** link to add new stages.

6. Enter the **Stage Name**, **Probability**, **Forecast Type**, and **Forecast Category** in the *Create New Stage* pop-up.

Create New Stage - Standard

STAGE NAME	PROBABILITY (%)	FORECAST TYPE	FORECAST CATEGORY
Qualification	10	Open	Pipeline
Needs Analysis	20	Open	Pipeline
Value Proposition	40	Open	Pipeline
Identify Decision Makers	60	Open	Pipeline
Proposal/Price Quote	75	Open	Pipeline
Negotiation/Review	90	Open	Pipeline
Closed Won	100	Closed Won	Closed
Closed Lost	0	Closed Lost	Omitted
		Select Type ⬍	Select Category ⬍

7. Click **Done**.
   The new stage will be added to the new master list of stage values.

8. Select the **Set as Default** checkbox if you want this pipeline to be the default when creating a deal.

9. Click **Save**.
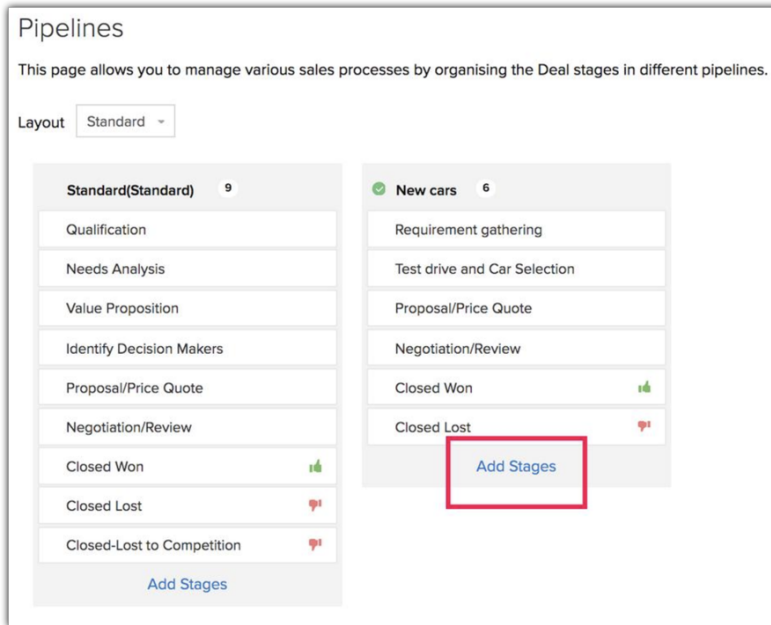
Modifying the stages in the pipeline

If your sales process is modified at any point, you can add or remove stages from the pipeline. The stages that you remove from a pipeline will not be deleted from CRM, they will still be available in the stage builder.

To modify the stages

1. Go to **Setup** > **Customization** > **Pipelines.**

2. Select the *Layout* from the dropdown list.

3. Drag and drop the values to reorder the stages.

4. Click the **Close** icon for a stage to remove it from the pipeline.
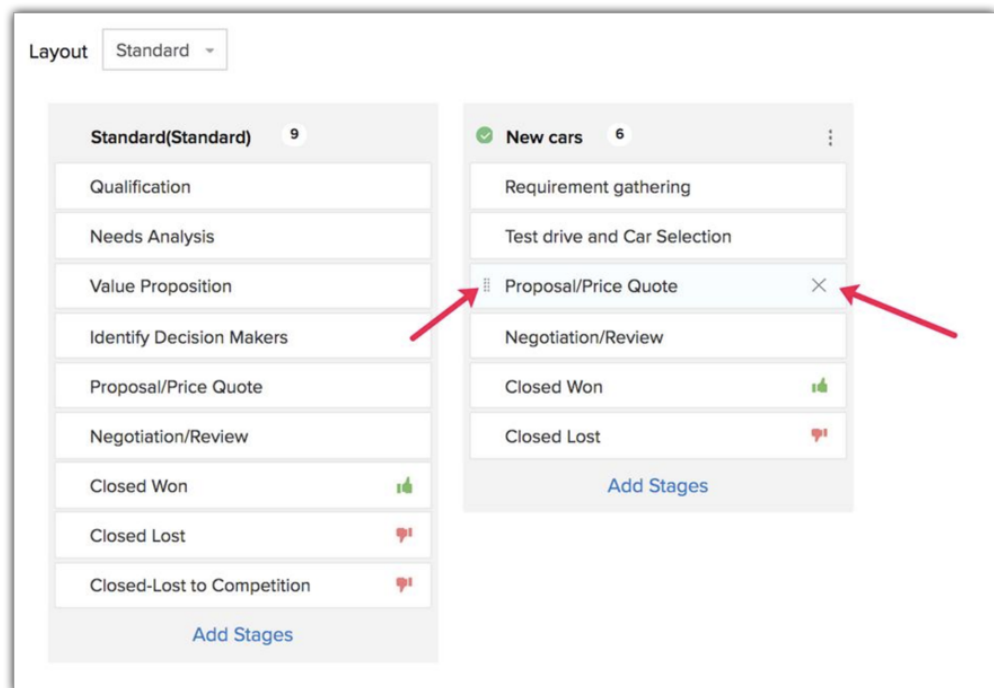
5. Click the **Add Stages** link in the pipeline that you want to edit.

6. Click on the stages to add them to the pipeline.

    All the available stages created for the selected layout will be listed

    here. You can add and associate new stages by clicking the **Create New**

    Stage link.

7. Click **Save**.
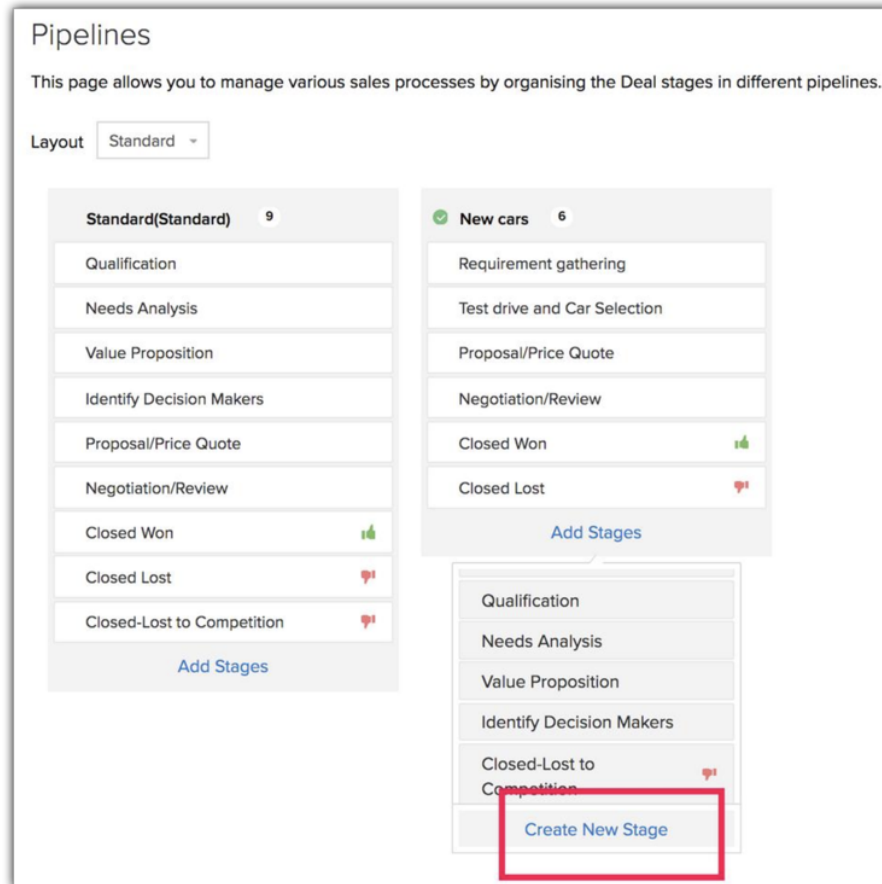
How do pipeline and deal stages influence other CRM activities?
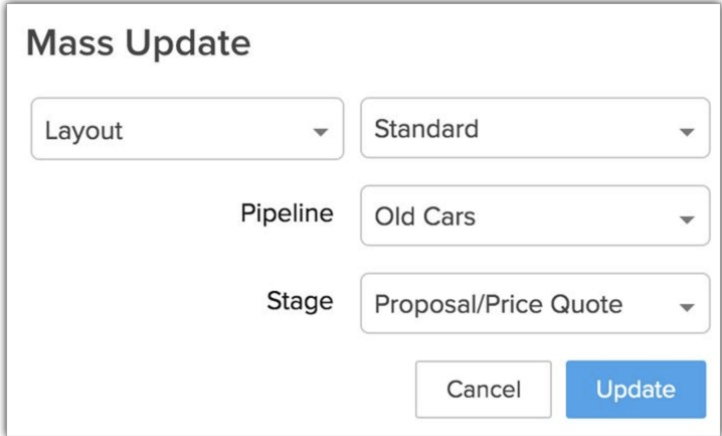
Mass updating records

When you mass update records, keep in mind that a pipeline is layout specific and the stages in it are specific to a particular pipeline. During the mass update, records will always be checked for a match in the following order: Layout > Pipeline > Stage. (You can mass update the layout, pipeline field, and stage field on records).

Mass update the Layout field

If you want to update the layout of multiple deals, you must also define the pipeline to move them to and the stage they will have.

Note that you will only need to select a pipeline if the layout has one; otherwise you can just select the desired layout and update the record.
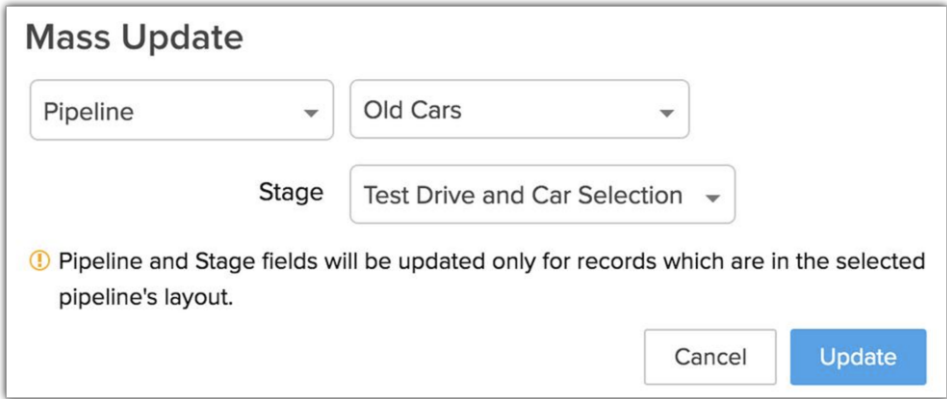
Mass update the Pipeline field

Since a pipeline is closely linked to a layout, when you mass update the pipeline for records, CRM will check whether the records belong to the layout you want to move them to. For example, imagine that you have two layouts: Sales and Services, each of which has two pipelines. If you select some deals from the list view and move them to a pipeline that belongs to the Sales layout, then only the deals that already belong to the Sales layout will be moved. The remaining deals will be skipped because they are from a different layout.

Mass update only the Stage field

If you only want to update the Stage field, the records with the selected stage in their pipeline will be updated. The other records will be skipped. For example, if

you choose the stage field to be updated to Negotiation, then only the records that have Negotiation in their pipeline will be updated, others will be skipped.

Note
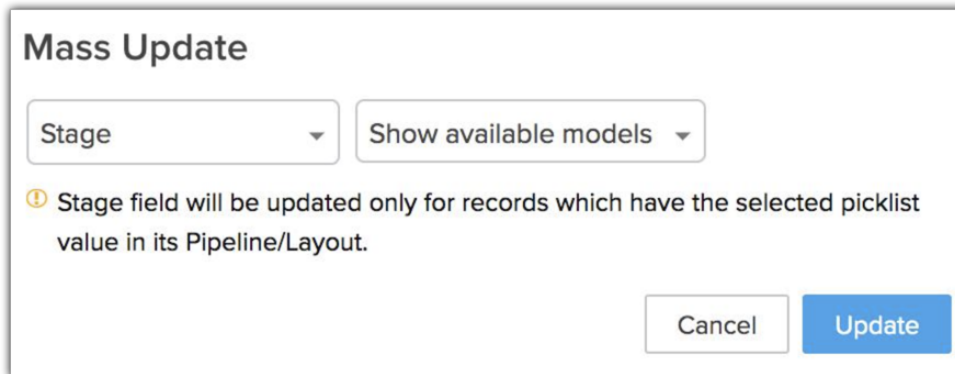
- Pipeline and Stage fields can also be updated through macros, workflow rules, Blueprints, and follow-up actions (field updates) after sending mass emails.
- If the Stage field is used as a criteria in a layout rule or validation rule, then the Stage field and its dependent fields (Pipeline and Layout) will not appear in the mass update options.
- If the Pipeline field is used as a criteria in a layout rule or validation rule, then the Pipeline field and its dependent field (Layout) will not appear in the mass update options.

Creating a blueprint based on the sales pipeline

The Stage field is often used in Blueprints. Generally, Blueprints are layout specific, but if you have created pipelines in the layout, they are pipeline specific. If you create a blueprint based on the Stage field, you will be required to select the pipeline it is associated to. All the values in the Stage field will be used in designing the blueprint.
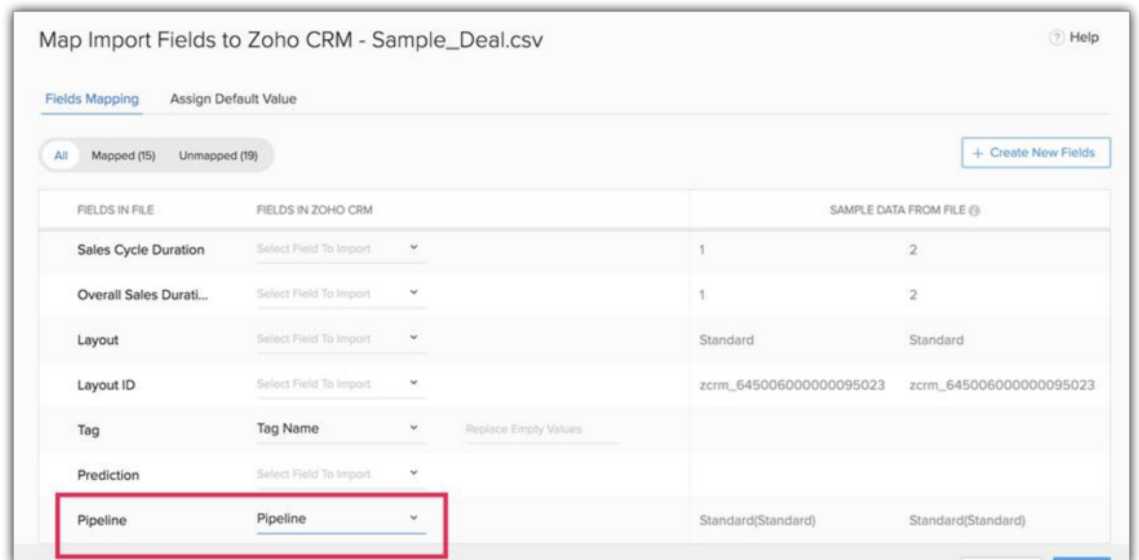
Note

- If you include a new stage in the blueprint, it will be automatically added to the pipeline.
- If a pipeline is deleted, any blueprints created for that pipeline will also be deleted.

Importing data based on the sales pipeline

When importing records, the Pipeline field needs be mapped so that deals are automatically assigned to the respective pipelines.

- **Importing deals for a different pipeline**: If you want to import records that belong to different pipelines, you need to add a column to the import file for details of the pipeline that the record belongs to. Map this field with CRM's Pipeline field when you import.
- **Importing deals for the same pipeline**: Pipeline is a mandatory field, so if the import file does not have the pipeline details then all the imported deals can be assigned to one selected pipeline. You can select a pipeline in *Assign Default Value*.

Note

Layouts, pipelines, and stages are dependent on each other, so you should expect records to be skipped in the following situations:

- **Layout-pipeline mismatch:** While importing, you need to specify the layout the records will be imported to. If the deal's pipeline does not belong to the selected layout, the record will be skipped due to the layout-pipeline mismatch.
- **Pipeline-stage mismatch**: If the deal's pipeline belongs to the selected layout, the system will check the stage selected for the record. If the stage value is not part of the deal's pipeline, the record will be skipped due to the mismatch.

In the import history, you can check the records which were skipped and the reasons why.

Kanban view

Deals in a Kanban view can be filtered based on the layout and pipeline.
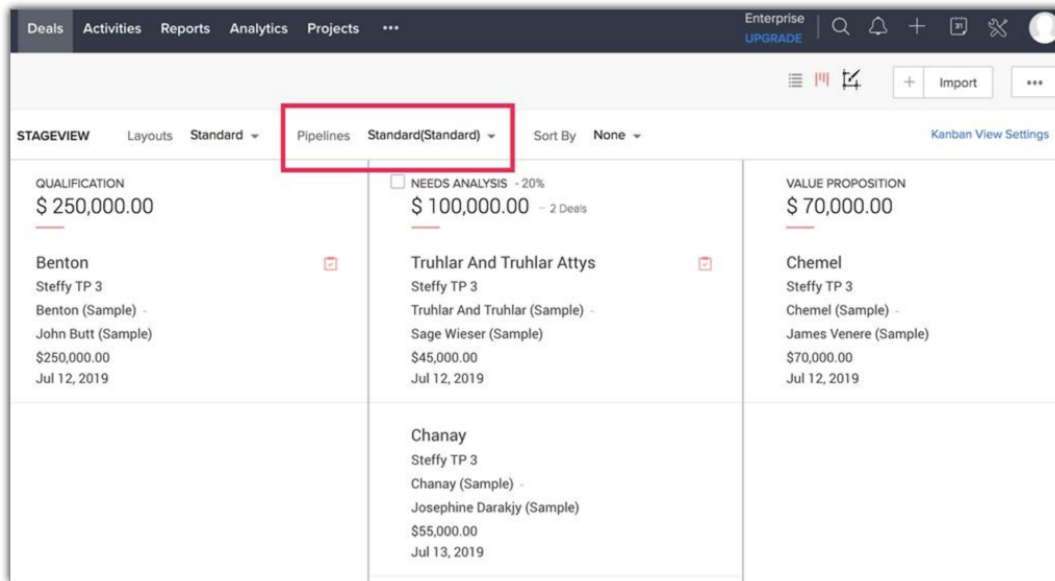
Migrating data

When you migrate from another CRM, the Pipeline field will be available during field mapping. The deals will be assigned to the layout's pipeline based on this field.

If the deals that to be migrated do not have a pipeline associated with them, they will be associated with the default pipeline in the selected layout.

Deleting a sales pipeline

To delete a sales pipeline

1. Go to **Setup** > **Customization** > **Pipelines**.

2. Hover over the ellipsis and click Delete.
   If there are records associated with that pipeline, you have to transfer them to another pipeline before you can delete it.

3. Select the pipeline you are transferring the data to.

4. Map the stages from the old pipeline to the new pipeline.

5. Click Transfer and Delete.

Note

- Deals that are already closed will be kept in the deleted pipeline and will not be transferred to a different one.
- When a layout is deleted, you can choose the layout to move the records to. If the layout the records are being transferred to has a pipeline, then you can choose the pipeline and the stage the records from the deleted layout will be transferred to.
- Closed deals from the deleted layout will be transferred to the default pipeline of the new layout.
- If a record is locked due to an approval process or review process in the Pipeline or Stage field, it will not be transferred to another pipeline when its pipeline or layout is deleted.