Contactually 101: Step 11………. Creating your Pipeline

If you are totally lost, you should be attending our Contactually workshops. This is a great program once you get your head around it. There are quite a few videos to help you get started. You can find them under the help tab on the top right corner.

Go to the Pipelines tab.

If there is a "Sales Pipeline" there, click on that name on the left, then click "edit pipeline" on the top right and then "delete pipeline" at the bottom.

Now click "New Pipeline" on the left.

In Name type "Deals" or whatever name you want to give your pipeline and hit your tab button.

You can label the steps in your Pipeline whatever you want. I labeled mine Listing, Inspection Period, Financing Period, HOA/COA Approval and Ready to Close because these are all the possible steps I saw as important to me but you can make yours whatever you want. I did check follow up or a program for any of mine. Once you have added all of your stages by tying them on the list, click the blue "save" button and your Pipeline will be created. Now, whenever you create a Deal, you can drag it from stage to stage to track how much money is in your Pipeline at any stage.

There is a lot more you can do with Pipelines and deals, but this is enough to get you started. Again, come to our workshops to learn more and watch some of the videos under the help section for more tips, tricks and great features. I have done demos on thousands of CRMs and this is by far the one I like best.