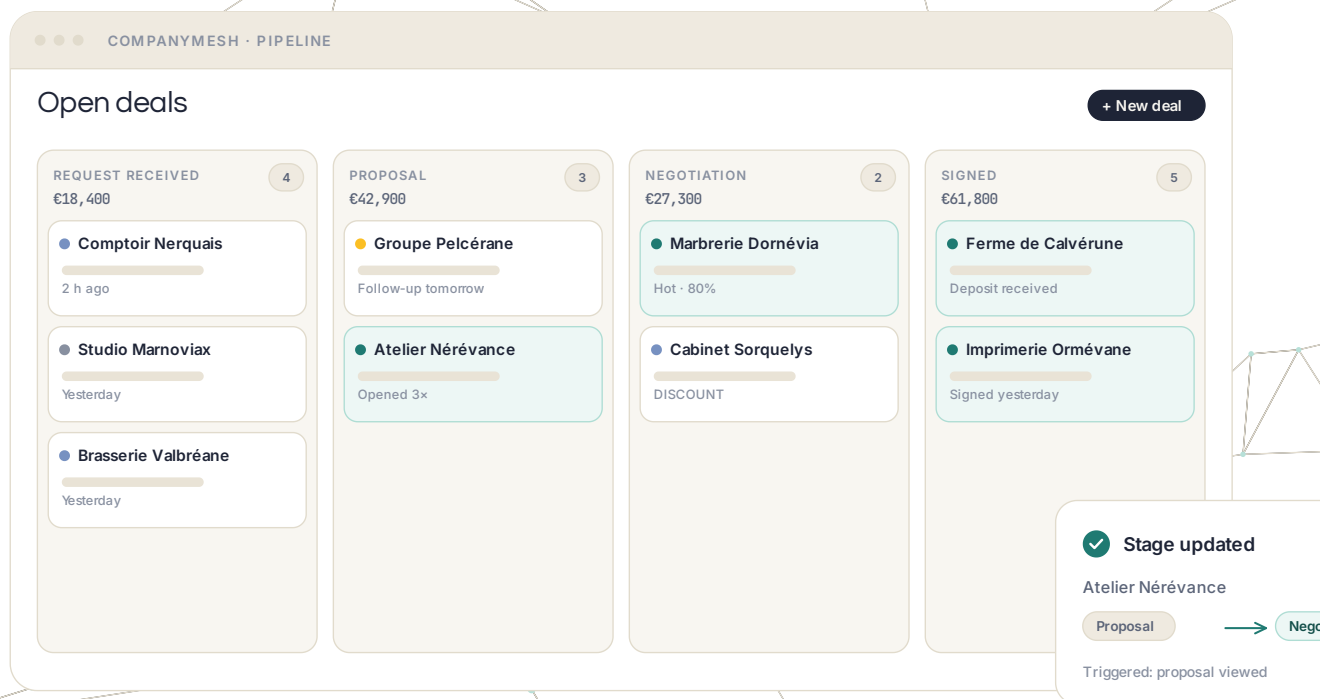


Pipeline & opportunities

Every deal in its place, every stage under control.



Every deal in its place, every stage under control.

Today your opportunities live somewhere between a spreadsheet, an inbox and your sales reps' memory. The Pipeline module puts every deal on one clear board, from first contact to signature and beyond. At a glance you see what's moving, what's stuck and what deserves your attention today.

An instant overview

Your sales activity and expected revenue, at a glance.

No forgotten deals

Follow-ups, priorities and history are tracked for you.

Less data entry

Deals move forward on their own as soon as an action happens.

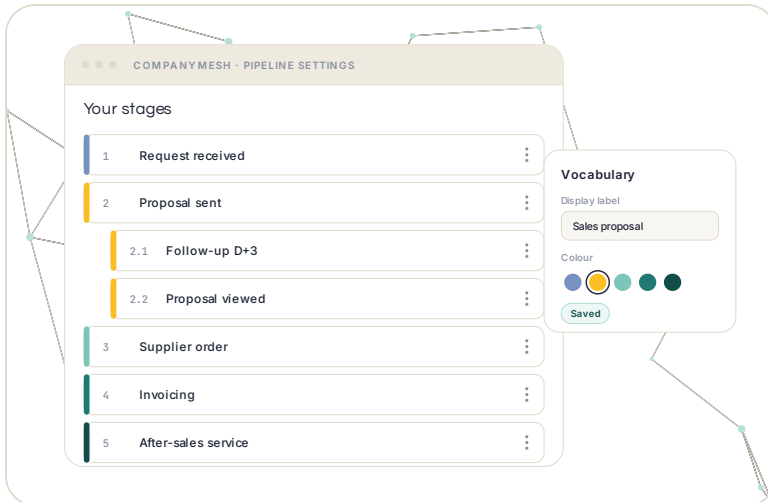
A tool that reflects you

Your stages, your words, your colours.

In this module

- 1 Stages that follow your process
- 2 An overview as a board or a list
- 3 Clear priorities every morning
- 4 Deals that move forward on their own
- 5 A deal record that tells the whole story
- 6 Put on hold, archive, restore
- 7 Follow-ups that never slip

FEATURES



1 Stages that follow your process

Your sales cycle, the way you live it.

In practice, you define your pipeline stages, their order, colour and label. A stage can contain sub-stages to detail a longer phase (supplier price request, follow-up, internal approval...). Key stages for your business can be locked to guarantee consistent tracking across the whole team.

What it enables

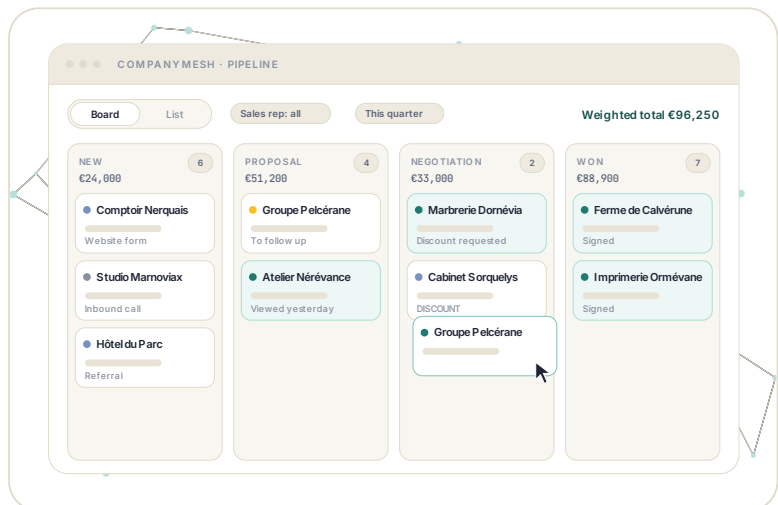
- Unlimited stages and sub-stages, reorderable at any time
- Custom colours to spot a phase at a glance
- Adapted vocabulary ("file", "offer", "site"...)
 - Protected system stages to secure your processes

2

An overview as a board or a list

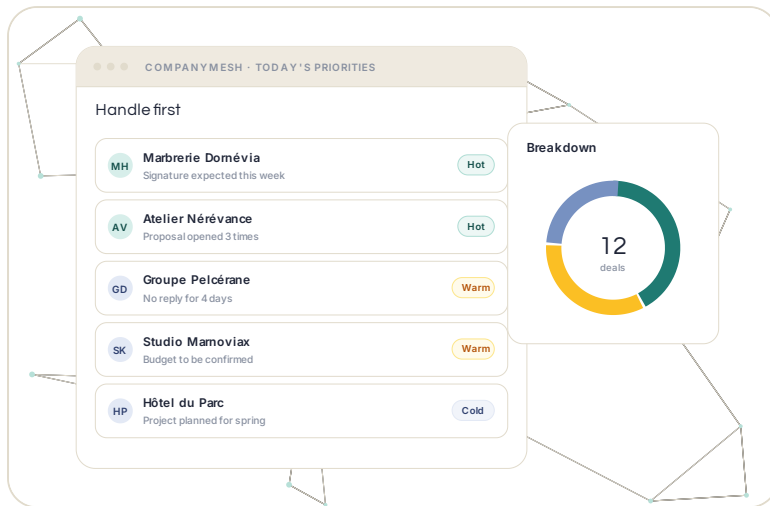
Drag, filter, decide.

The board shows your deals in stage columns. A simple drag and drop moves a deal forward. Each column shows the number of deals and the expected amount. The list view lets you sort and filter precisely to prepare a sales meeting or a team check-in.



What it enables

- Board (kanban) and list views, as each user prefers
- Filters by sales rep, period, source, amount or priority
- Totals per stage and weighted revenue
- Automatic deal numbering (custom prefix and format)



3 Clear priorities every morning

Cold, warm, hot: you know where to act.

Each deal carries a temperature and a probability of closing. Combined with the latest activity and customer signals (proposal viewed, reply received...), they feed a list of deals to handle first. Your sales reps start their day in the right place.

What it enables

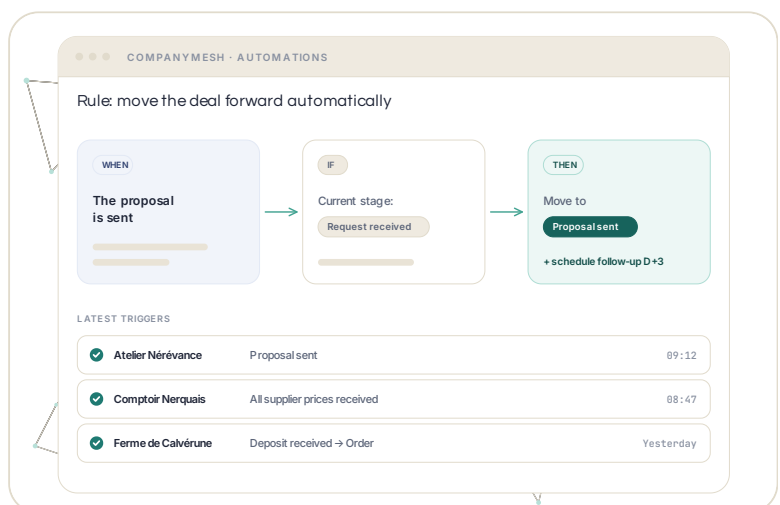
- Cold / warm / hot levels and signing probability
- Alerts on deals with no activity for too long
- "Handle first" list per sales rep
- Visual breakdown of the portfolio

Example — A proposal is opened three times in two days: the deal jumps to the top of the list with the "hot" status.

4 Deals that move forward on their own

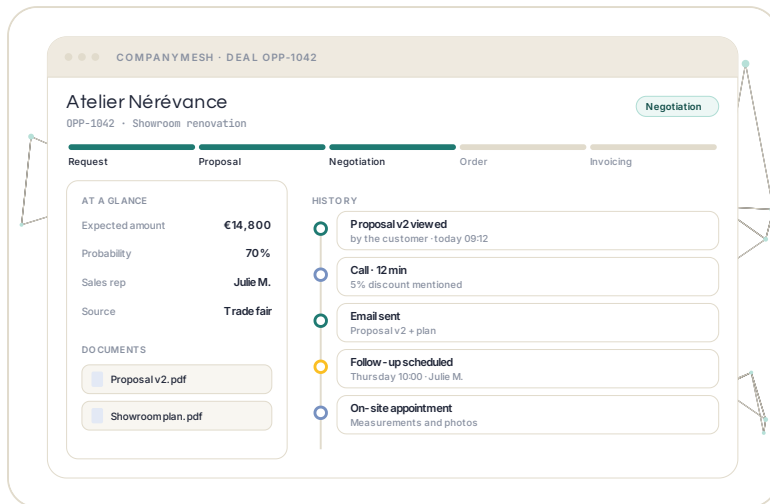
When something happens, the pipeline follows.

You define simple rules: **when** an action happens, **if** the deal is at a given stage, **then** it moves to the next stage. A proposal generated, an email sent, all supplier prices received, a deposit paid: the pipeline updates itself with no re-keying, and every trigger is logged.



What it enables

- "When / if / then" rules configured without development
- Chained actions: stage change, scheduled follow-up, team notification
- Triggers: proposal generated or sent, supplier reply, payment, signature...
- Log of every automation run



5 A deal record that tells the whole story

The full history, in one place.

Each opportunity has its own record: expected amount, probability, sales rep in charge, contact origin, documents, successive proposals and the history of interactions (emails, calls, appointments, notes). A colleague can take over a deal in two minutes without asking anyone.

What it enables

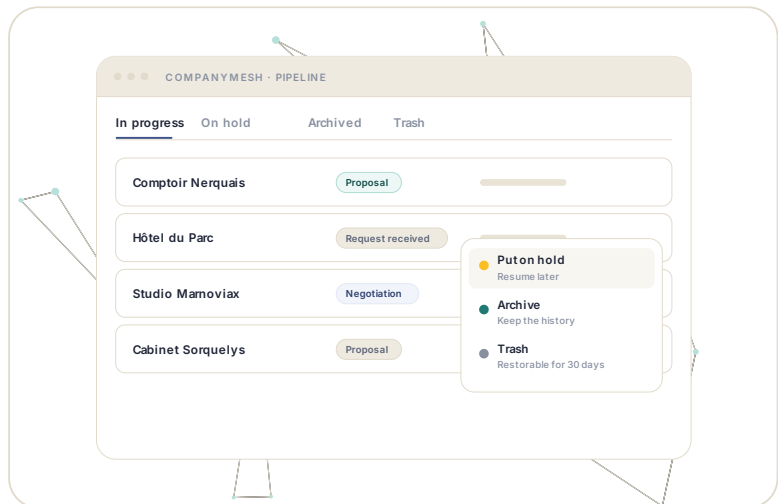
- Stage progress bar
- Timeline of emails, calls, appointments and notes
- Linked proposals and documents, versions kept
- Contact origin and dedicated sales rep

6

Put on hold, archive, restore

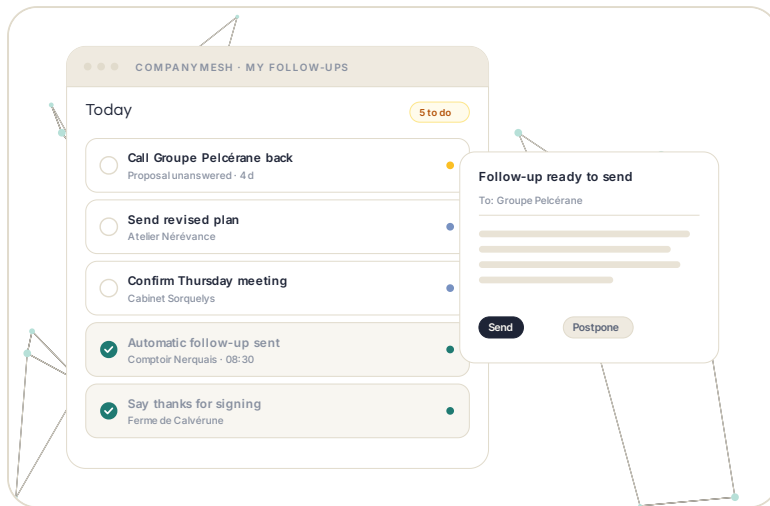
A clean pipeline, without losing anything.

A project postponed until spring? Put it on hold: it leaves the board without disappearing. A deal completed? Archive it with its full history. A data-entry mistake? The trash lets you restore it. Your board stays focused on what matters now.



What it enables

- "On hold", "archived" and "trash" statuses
- One-click restore
- History kept for your analysis and customer follow-up
- Permanent deletion reserved for authorised profiles



7 Follow-ups that never slip

The right follow-up, at the right time.

Follow-ups are scheduled from the deal or automatically after a stage. Each sales rep finds their list for the day, with messages prepared from your templates. They send, postpone or personalise in one click, and the action is added to the deal history.

What it enables

- Dated tasks and reminders, assigned to a team member
- Customisable email templates
- Automatic follow-ups after a period without reply
- Sync with everyone's calendar

TAILORED

Adapted to your business

Do you talk about “files”, “offers” or “proposals” rather than “opportunities”? Does your cycle have three stages, or twelve, with sub-stages at your suppliers? The pipeline follows **your** process and **your** vocabulary. We build it with your teams during the kick-off workshops, then fine-tune it as it's used.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Email & calendar

Microsoft 365

Outlook / Exchange

Gmail

Google Calendar

Telephony

3CX

Ringover

Aircall

Signature & payment

SignWell

Yousign

DocuSign

Stripe

PayPal

Mollie

Import & collaboration

HubSpot

Salesforce

Pipedrive

Excel / CSV

Slack

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`crm.leads` Prospecting & lead capture

`crm.quotes` Quotes & sales proposals

`crm.pricing` Pricing & margins

`auto.workflows` Automations

`ops.dashboard` Dashboards & search

Let's talk about your future tool

Tailored demo, by appointment.

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