

**Technokrafts Labs  
Pvt. Ltd.**

<b>Document Name</b>	<b>Sales Funnel Manual</b>
	<b>Sales Funnel</b>
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**Contents**

1. Introduction..... 3

2. Requirements ..... 3

3. Features ..... 3

4. Sales Funnel Module Installation..... 3

5. Module Description for Sales Funnel ..... 6

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# 'Sales Funnel' FOR VTIGER CRM 7.0.1

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## 1. Introduction

Sales Funnel 1.0 is designed for Vtiger CRM 7.0.1. It used to represent the stages in a [sales process](#).

You can create "Funnel Chart" in visualizing and identifying business data in sales process because funnel charts best for represent the various stages in Sales.

## 2. Requirements

- VtigerCRM version ( 7.0.1)

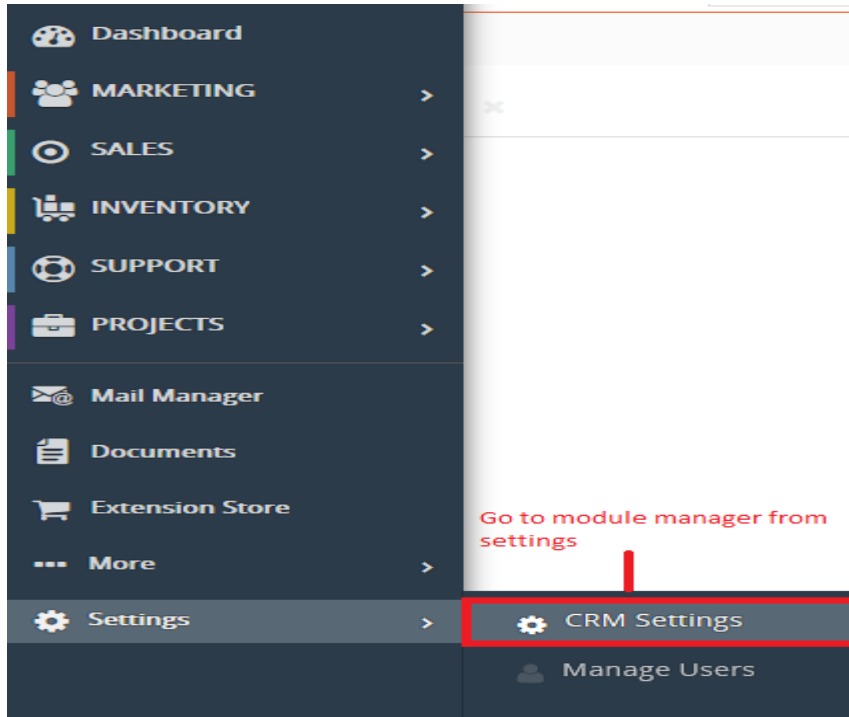
## 3. Features

- It visualizes the progressive reduction of data as it passes from one stage to another.
- Graphical Representation: - Easy understanding of Sales Process and related bulk data.
- Analysis of sales more quickly than the raw data.
- Quick: - When user selects particular stage of modules it display data on chart and table.
- The sales funnel visually describes the sales process from initial purchases to final sale.
- Data display on chart determines where sales should focus attention and efforts to keep sales at the desired level and to meet sales targets.

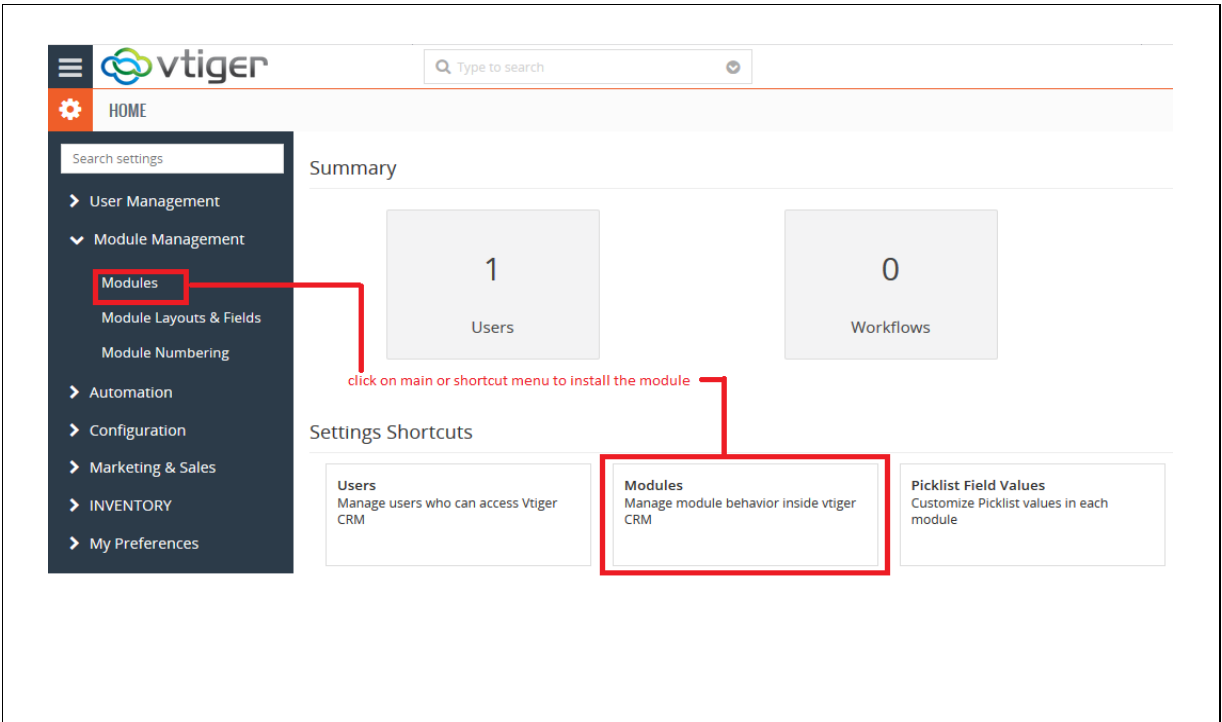
## 4. Sales Funnel Module Installation

For "Sales Funnel" module installation please refer following screen shots.

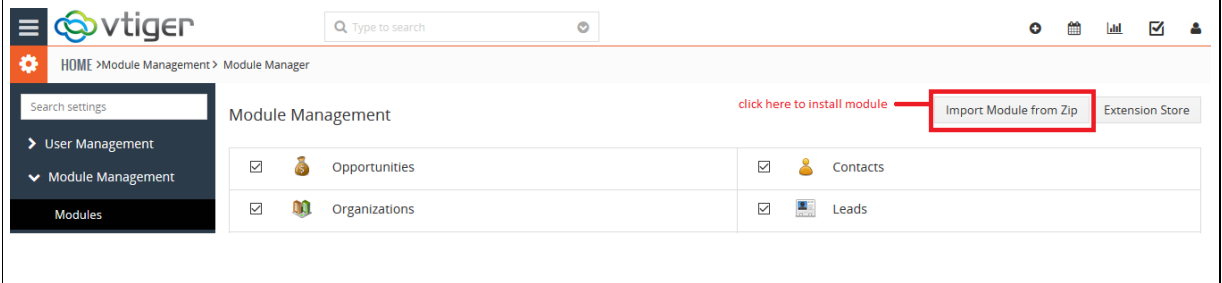
Picture 4.1.1



Picture 4.1.2



Picture 4.1.3



Picture 4.1.4

## Import Module from Zip

**Disclaimer - Custom Files could put your CRM at risk**

This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.

I accept with disclaimer and would like to proceed

Select from My Computer

C:\fakepath\SalesFunnel\_7.0.1-1.0.zip

browse and select the module zip from your system. accept the disclaimer and click on Import button to install the module.

Import

Cancel

**Picture 4.1.5**

## Verify Import Details

### SalesFunnel

Vtiger Version : 7.0.1

I accept the license agreement.

accept the license agreement and click on "Import Now" button to install the module.

Import Now

Cancel

Picture 4.1.6

## Verify Import Details

### SalesFunnel

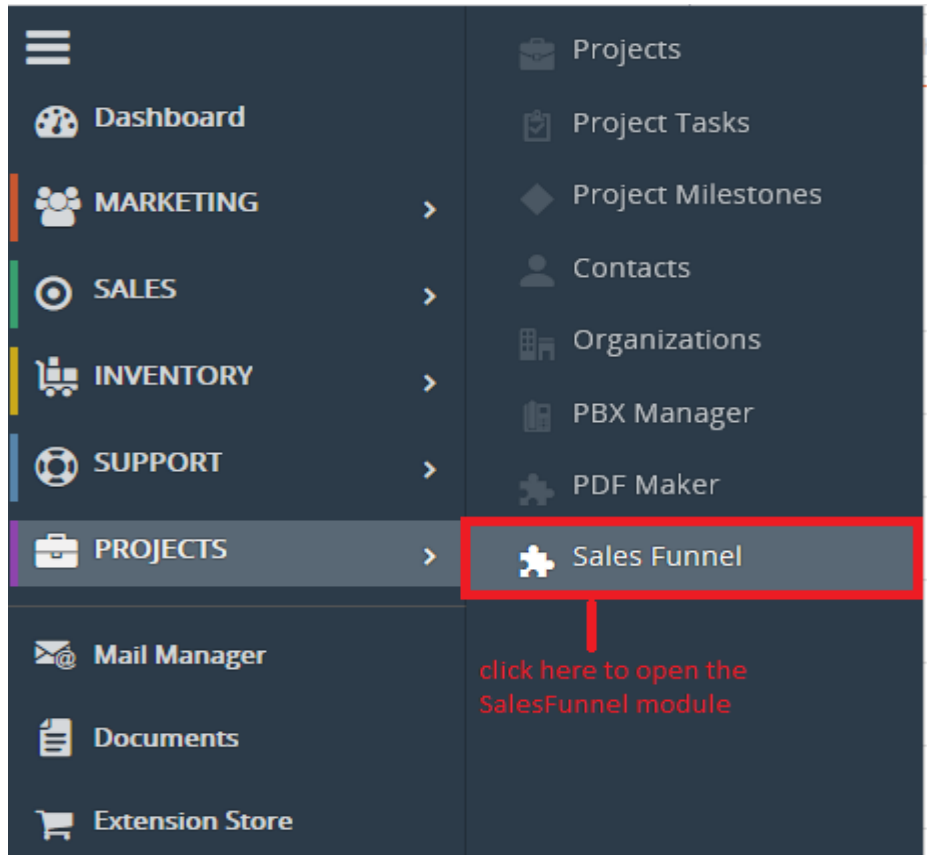
Vtiger Version : 7.0.1

I accept the license agreement.

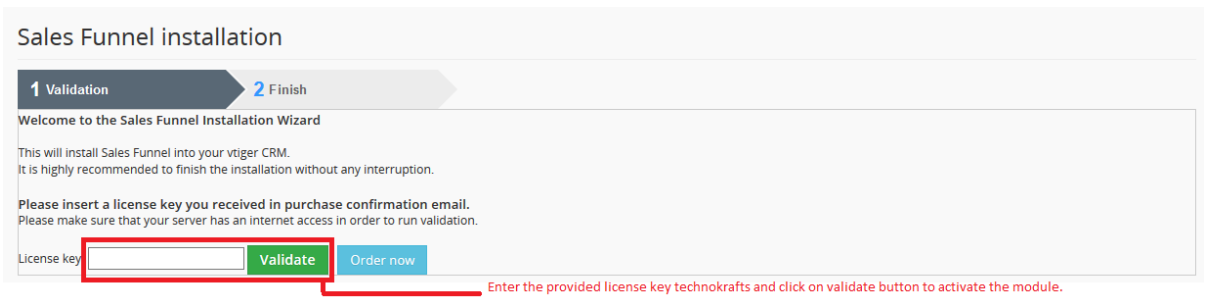
✔ Import Successful

SalesFunnel module was imported successfully.

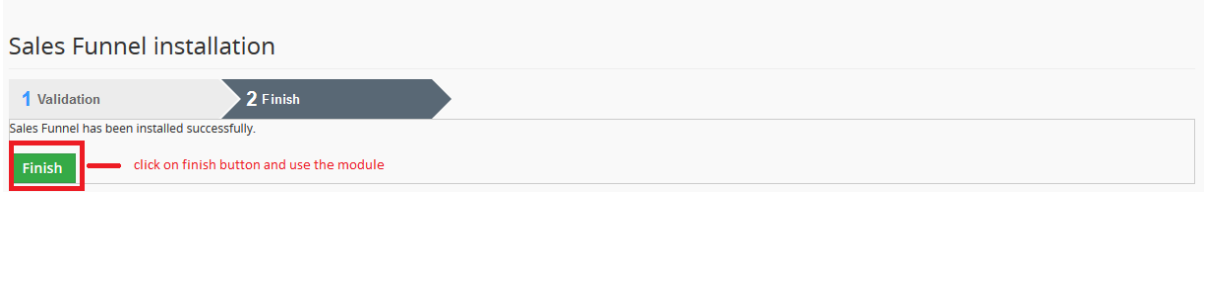
Picture 4.1.7



Picture 4.1.8



Picture 4.1.9

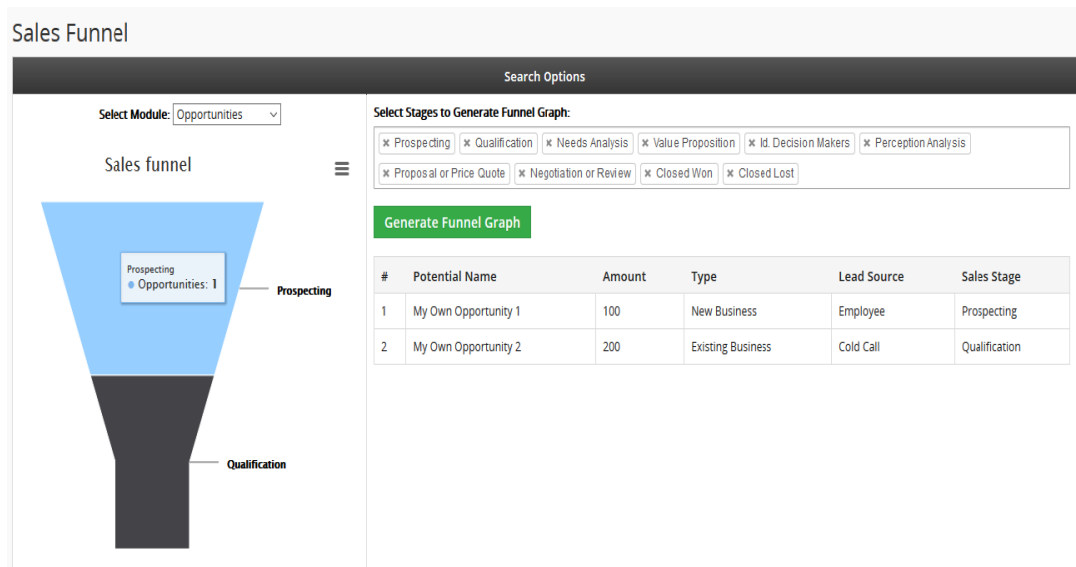




## 5. Module Description for Sales Funnel

- α. Sales Funnel is for “Opportunities”, “Quotes”, “Purchase Order”, “Invoice” and “Sales Order” modules.
- β. User can select module from drop down list and can select multiple stages from drop-down list.
- γ. In “Sales Funnel” default module is the “[Opportunities](#)” module and all related stages of data are display in multi-select box.
- δ. On chart the “Number of Opportunities” showing records of particular stage and display data in tabular format.
- ε. Please refer following screen shots.

Picture 5.1.1



Picture 5.1.2

Sales Funnel

Select Module: Opportunities

Select Stages to Generate Funnel Graph:

Generate Funnel Graph

#	Potential Name	Amount	Type	Lead Source	Sales Stage
1	My Own Opportunity 1	100	New Business	Employee	Prospecting
2	My Own Opportunity 2	200	Existing Business	Cold Call	Qualification

The screenshot shows the 'Sales Funnel' interface. On the left, there is a funnel chart with two segments: a top blue segment labeled 'Prospecting' and a bottom dark grey segment labeled 'Qualification'. To the right of the chart is a 'Select Module' dropdown menu with 'Opportunities' selected. Further right is a 'Select Stages to Generate Funnel Graph' section with a search bar and a list of stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal or Price Quote, Negotiation or Review, Closed Won, and Closed Lost. A green 'Generate Funnel Graph' button is below this list. Below the button is a table with 6 columns: #, Potential Name, Amount, Type, Lead Source, and Sales Stage. The table contains two rows of data.

Picture 5.1.3

Sales Funnel

Select Module: Opportunities

Select Stages to Generate Funnel Graph:

Generate Funnel Graph

Print chart

Download PNG image

Download JPEG image

Download PDF document

Download SVG vector image

#	Potential Name	Amount	Type	Lead Source	Sales Stage
1	My Own Opportunity 1	100	New Business	Employee	Prospecting
2	My Own Opportunity 2	200	Existing Business	Cold Call	Qualification

This screenshot is similar to the previous one but highlights the download options for the generated chart. A red box is drawn around a menu that appears when hovering over the chart. The menu contains the following options: 'Print chart', 'Download PNG image', 'Download JPEG image', 'Download PDF document', and 'Download SVG vector image'. A red arrow points from the text 'download the generated funnel chart as png,jpeg image or as pdf or svg vector image' to the 'Download PNG image' option.