

Technokrafts Labs
Pvt. Ltd.

Document Name	Sales Funnel Manual
	Sales Funnel
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'Sales Funnel' FOR VTIGER CRM 6.5.0

1. Introduction

Sales Funnel 1.0 is designed for Vtiger CRM 6.5.0. 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 (6.5.0)
- Adobe Flash Player:-Latest Version.

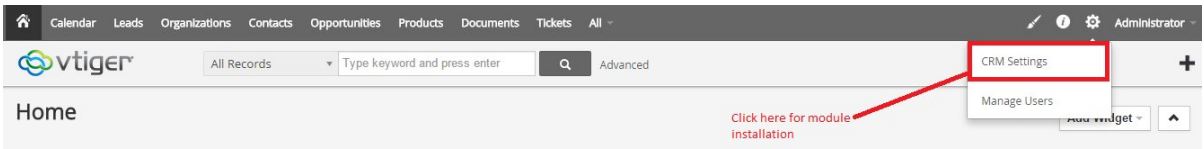
3. Features

- 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.

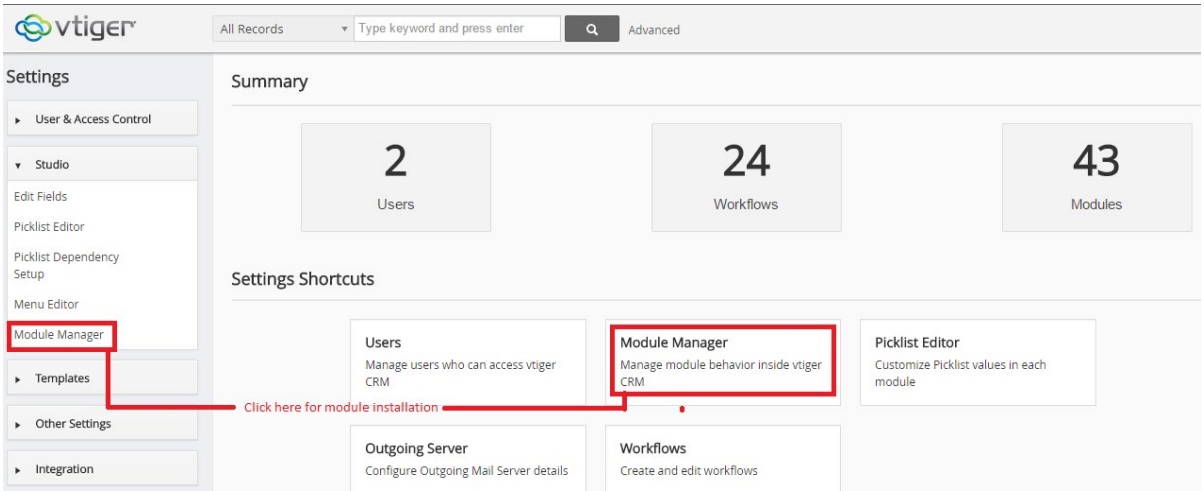
4. Sales Funnel Module Installation

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

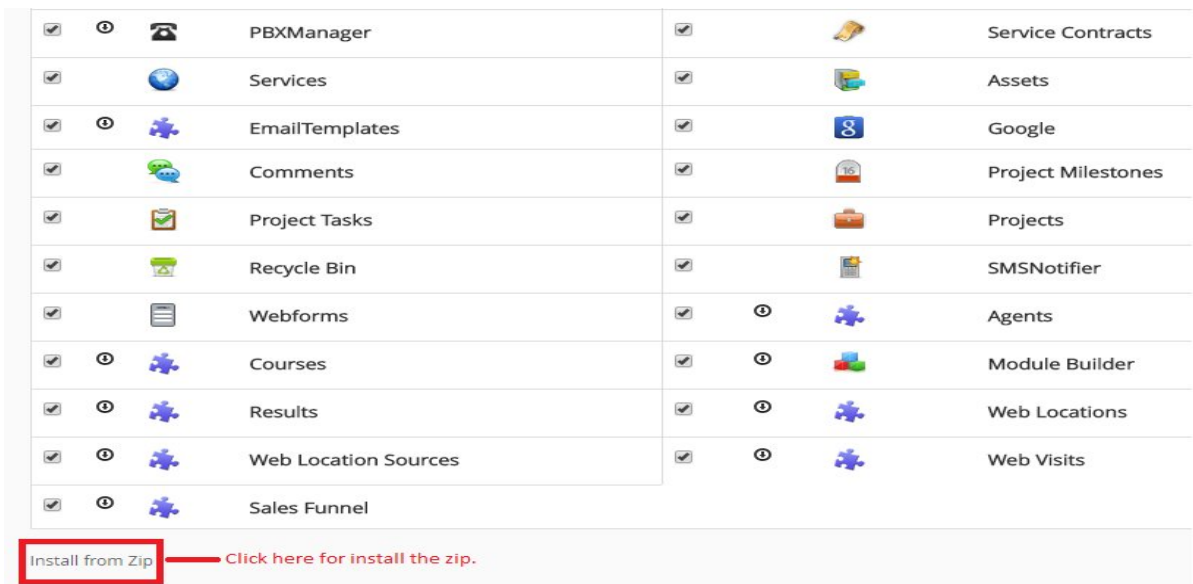
Picture 4.1.1



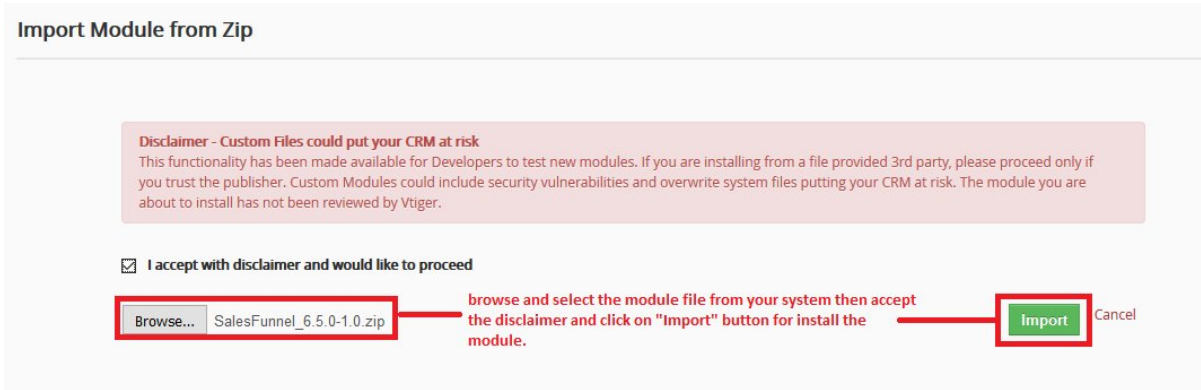
Picture 4.1.2



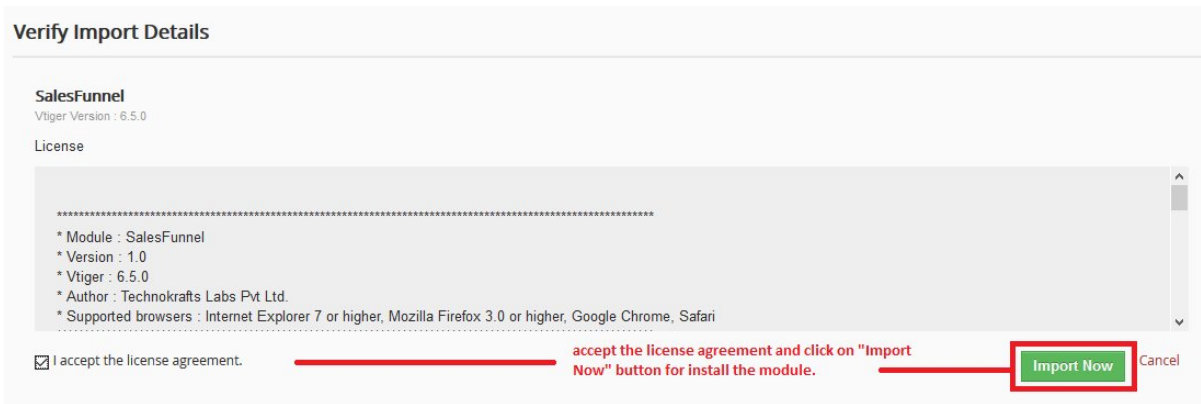
Picture 4.1.3



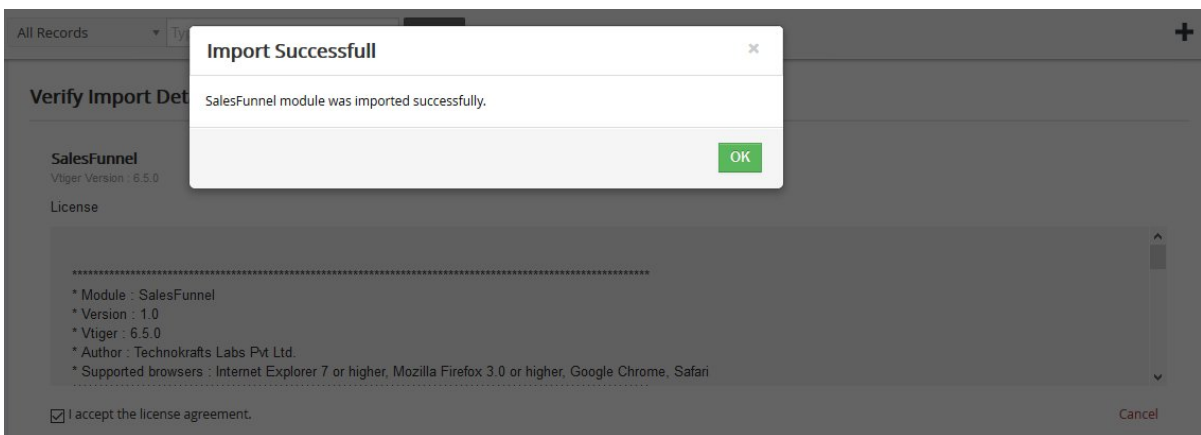
Picture 4.1.4



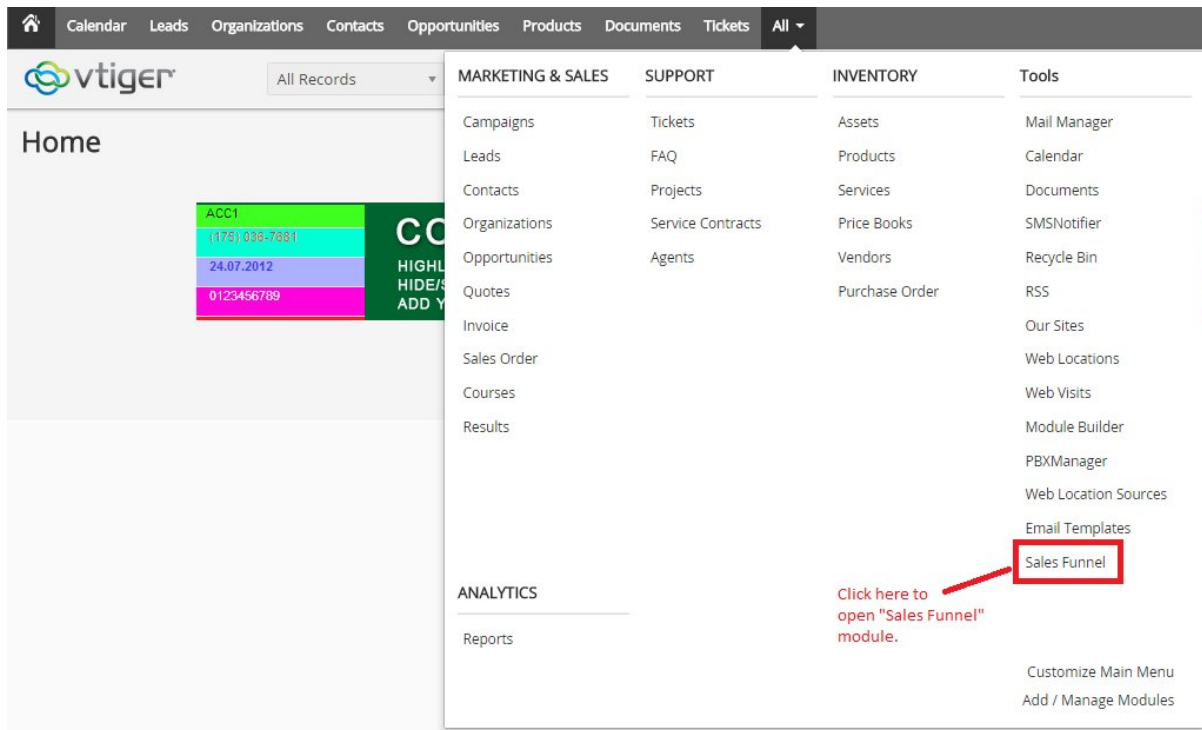
Picture 4.1.5



Picture 4.1.6



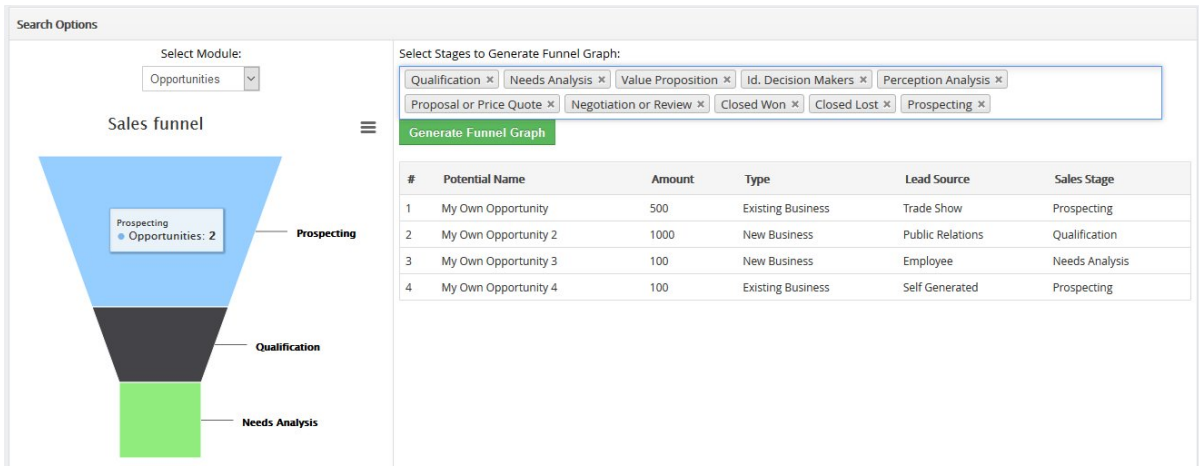
Picture 4.1.7



5. Module Description for Sales Funnel

- Sales Funnel is for "Opportunities", "Quote", "Purchase Order", "Invoice" and "Sale Order" modules.
- User can select module from drop down list and can select multiple stages from dropdown list.
- In "Sales Funnel" default module is the "Opportunities" module and all related stages of data are display in multi-select box.
- On chart the "Number of Opportunities" showing records of particular stage and display data in tabular format.
- Please refer following screen shots.

Picture 5.1.1



Picture 5.1.2

