



# SelectHub

Confidence in Software

# PIPELINER

## CUSTOM SCORECARD

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# About SelectHub

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SelectHub is a cloud-based Technology Selection Management (TSM) software platform helping streamline software selection and IT sourcing to be more data-driven, agile and collaborative. The platform offers a comprehensive set of evaluation stages from requirements gathering to vendor shortlisting, RFIs and RFPs, demo scorecarding, and proof-of-concept management. With over 24,000 enterprises on the platform, SelectHub also publishes a library of “best practice” requirements templates along with community-sourced vendor / product ratings across 100+ technology categories, including popular software categories such as ERP, BI, CRM, HRMS, CMMS, marketing automation and supply chain management. SelectHub was named one of the fastest-growing software companies in the 2018 edition of the Inc. 500. SelectHub customers include ABC Supply Company, CNO Financial Group, QEP Resources and the State of Colorado.

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To learn more, please visit  
[www.selecthub.com](http://www.selecthub.com)

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Thank you for using the SelectHub Express Scorecard. This scorecard is designed to help users like yourself understand how selected products perform when it comes to the key business requirements in a specific software category. It also includes a short description of how the vendor(s) might fulfill each requirement. These responses are formulated using input from our analyst team as well as the vendors themselves. The numerical score comes from SelectHub's inbuilt algorithm, which measures how well a product is able to fulfill the listed requirements. The requirements contained in the scorecard are determined by what's typically considered "best practice" in the category, but can also be sorted to reflect what's most suitable based on the prospective buyer's user profile and the strengths of the selected vendors.

If you need  
answers to an  
RFI:



Under each requirement will be the systems you choose to compare. The different vendors will all have a number in parentheses next to them which designates how well that solution fulfills the requirement. Use this scorecard to see which vendor can best satisfy your most important business needs.

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## Scorecard Summary



The ratings for Pipelinier have been compiled individually below with an overall Scorecard Summary score of 98. Of the three requirement categories, all of them have earned a green rating.

Requirement Category		Score
1	Functional Requirements	99
2	Key Requirements	98
3	Technical Features	96

# DETAILED VENDOR RESPONSES

## 1. FUNCTIONAL REQUIREMENTS

### 1.1 ACCESS CONTROL AND DATA SECURITY

#### 1.1.1

EXTERNAL USER ACCESS CONTROL THE SOLUTION PROVIDES USERS OUTSIDE THE CORPORATE FIREWALL WITH A SIMPLIFIED WAY TO CONNECT TO THE CRM SYSTEM AND ACCESS DATA.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Cloud solution so anyone with an internet connection can access.



### 1.1.2

**INTERNAL USER ACCESS CONTROL** THE SOLUTION ENSURES SECURITY AND HAS PROPER MECHANISMS FOR ACCESS CONTROL. IT CHECKS THE CREDENTIALS OF THE INTERNAL USER BEFORE GIVING THEM THE RIGHT TO ACCESS THE SYSTEM.

HIGH PRIORITY



**Fully Supported Out of the Box (100)**

Yes.

### 1.1.3

**SINGLE SIGN-ON AND ACCESS** THE SOLUTION SUPPORTS SINGLE SIGN-ON BASED ON POPULAR DIRECTORIES AND STANDARDS SUCH AS LDAP, ACTIVE DIRECTORY AND SAML.

HIGH PRIORITY



**Moderately Supported Out of the Box (85)**

SSO is supported.

### 1.1.4

**SINGLE VIRTUAL APPLICATION** THE SOLUTION HAS THE ABILITY TO BE LAUNCHED WITHIN A SINGLE APPLICATION FOOTPRINT.

LOW PRIORITY



**Fully Supported Out of the Box (100)**

Yes.

### 1.1.5

**PASSWORDS** THE SOLUTION'S ACCESS IS PROTECTED WITH THE USE OF USER-SPECIFIC PASSWORDS.

LOW PRIORITY



**Fully Supported Out of the Box (100)**

Yes.

## 1.2 ACTIVITY MANAGEMENT

### 1.2.1

MEDIUM PRIORITY

**CALENDAR MANAGEMENT** THE SOLUTION ENABLES EASY MANAGEMENT OF ALL APPOINTMENTS WITH BUSINESS RELATIONS, CONTACTS AND COLLEAGUES. THIS SHOULD BE DONE VIA INTEGRATION WITH USERS' EXISTING CALENDARS ON POPULAR SYSTEMS SUCH AS GOOGLE CALENDAR, MICROSOFT OUTLOOK, ETC. THE SOLUTION SHOULD ENABLE THE LINKING OF AN APPOINTMENT TO A CONTACT, A PROJECT FOLDER OR A TEAM MEMBER, THAT CAN BE SET AS RECURRENT, ALL DAY OR ON SPECIFIC TIME.



#### **Fully Supported Out of the Box (100)**

You can activate the integration with Gmail and Outlook - provided free of charge - native integration built by Pipeliner - same for email.

### 1.2.2

HIGH PRIORITY

**TASK MANAGEMENT** THE SOLUTION HAS TOOLS TO HELP USERS MANAGE TASKS MORE EFFICIENTLY, WHILE ENSURING THAT TASKS ARE COMPLETED ACCORDING TO SCHEDULE. WHEN A TASK IS CREATED IN THE CRM, IT SHOULD BE AUTOMATICALLY LINKED TO THE CORRESPONDING ACCOUNT, CONTACT, OR OPPORTUNITY.



#### **Fully Supported Out of the Box (100)**

Task management is very robust, set delivery dates, reminders, auto-schedule recurring tasks, report on tasks, view on task board, be reminded as part of your Navigator dashboard.

HIGH PRIORITY

**1.2.3**

**DOCUMENT AND FILE MANAGEMENT** THE SOLUTION ALLOWS USERS TO QUICKLY LOCATE AND ACCESS CUSTOMER-RELATED DOCUMENTS SUCH AS PROPOSALS, PRESENTATIONS, CONTRACTS, PURCHASE ORDERS, INVOICES, QUOTES AND EMAILS FROM ITS INTERFACE.

**Fully Supported Out of the Box (100)**

Documents can be attached to Accounts, Contacts, Lead, Opportunities, tasks etc. plus they can be embedded in the sales stage for ease of access at the right time.

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## 1.3 CHAT SUPPORT

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### 1.3.1

**INTEGRATED CHAT SUPPORT** THE SOLUTION INCLUDES SECURE CHAT SUPPORT CAPABILITIES, SO THAT USERS CAN RECEIVE LIVE HELP FROM THE VENDOR WEBSITE, KNOWLEDGEBASE, OR SELF-SERVICE SUPPORT PORTAL.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

Knowledgebase, Live Chat all included.

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## 1.4 CUSTOMER DATABASE

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**1.4.1**

**CUSTOMER HISTORY** THE SOLUTION MAINTAINS  
CUSTOMER HISTORY FOR REPORTING AND TRACKING.

HIGH PRIORITY



**Fully Supported Out of the Box (100)**

## 1.5 EMPLOYEE TRACKING

### 1.5.1

**PERFORMANCE TRACKING** THE SOLUTION PROVIDES TOOLS TO TRACK THE PERFORMANCE OF EACH SALES REP AS HE/SHE INTERACTS AND WORKS WITH THE CONTACTS.

LOW PRIORITY



#### **Fully Supported Out of the Box (100)**

There are multiple ways of doing this in Pipeliner - Insights provides team, territory, individual performance comparison charts and visuals and the mobile AI shows user performance against top performers. Accountability and transparency are core to the system.

### 1.5.2

**SOCIAL CRM** THE SOLUTION PROVIDES TOOL THAT ALLOWS THE USERS TO CREATE AN INTRACOMPANY SOCIAL NETWORK WITHIN OR VIA THE CRM APPLICATION.

LOW PRIORITY



#### **Fully Supported Out of the Box (100)**

There are multiple ways of doing this in Pipeliner - Insights provides team, territory, individual performance comparison charts and visuals and the mobile AI shows user performance against top performers. Accountability and transparency are core to the system.

### 1.5.3

**RECORDS NEEDED** THE SOLUTION OFFERS AN EMPLOYEE DATABASE IN A TARGET ACCOUNT AND HAS THE RECORDS OF RELEVANT CURRENT AND PAST EMPLOYEES IN SPECIFIC DEPARTMENTS, SUCH AS I.T., MARKETING, FINANCE, ETC.

LOW PRIORITY



#### **Fully Supported Out of the Box (100)**

There are multiple ways of doing this in Pipelinier - Insights provides team, territory, individual performance comparison charts and visuals and the mobile AI shows user performance against top performers. Accountability and transparency are core to the system.

### 1.5.4

**DEPARTMENT-LEVEL INTERACTION TRACKING** THE SOLUTION TRACKS INTERACTIONS ACROSS VARIOUS EMPLOYEES AND DEPARTMENTS WITHIN THE SAME ACCOUNT TO BE UTILIZED FOR FRAGMENTATION ANALYSIS AND FLANK-ATTACKS., SUCH AS I.T., MARKETING, FINANCE, ETC.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

LOW PRIORITY

**1.5.5****CONCEPT OF ORGANIZATIONAL HIERARCHY**

THE SOLUTION STORES PROSPECT DATA IN A MANNER THAT CORRESPONDS TO THE DESIGNATION OF THE PEOPLE IN THE ORGANIZATION.

**Fully Supported Out of the Box (100)**

There are multiple ways of doing this in Pipeliner - Insights provides team, territory, individual performance comparison charts and visuals and the mobile AI shows user performance against top performers. Accountability and transparency are core to the system.



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## 1.6 EMAIL SUPPORT

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### 1.6.1

**EMAIL INTEGRATION** THE SOLUTION CAN INTEGRATE WITH CORPORATE EMAIL SYSTEMS, SUCH AS GMAIL, LOTUS NOTES, OR EXCHANGE.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Pipeliner has Gmail and Outlook integration capability included out of the box.

## 1.7 INTERNATIONALIZATION

### 1.7.1

**INTERFACE LOCALIZATION** THE SOLUTION'S USER INTERFACE AND DISPLAY LANGUAGE SUPPORTS NON-US FORMATS.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

### 1.7.2

**MULTI-LANGUAGE SUPPORT** THE SOLUTION SUPPORTS MULTIPLE LANGUAGES FOR DATA ENTRY AND RETRIEVAL, BOTH SINGLE BYTE AND MULTI-BYTE FORMATS.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

**1.7.3**

**MULTI-CURRENCY SUPPORT** THE SOLUTION SUPPORTS FOREIGN CURRENCY DISPLAY, STORAGE AND CALCULATIONS ALONG WITH APPROPRIATE US DOLLAR TO FOREIGN CURRENCY CONVERSIONS (BASED ON CURRENT OR HISTORICAL EXCHANGE RATE BEING INPUT OR RETRIEVED FROM RELIABLE ONLINE SERVICES).

MEDIUM PRIORITY

**Fully Supported Out of the Box (100)****1.7.4**

**SORT ORDER** THE SOLUTION DISPLAYS DATA IN FOREIGN LANGUAGE SORT ORDER.

MEDIUM PRIORITY

**Fully Supported Out of the Box (100)**

## 1.8 KNOWLEDGE MANAGEMENT

### 1.8.1

**METRICS** THE SOLUTION SUPPORTS METRIC TRACKING SUCH AS -DATA AVAILABILITY (REQUIRED FIELDS, REPORTING AGAINST CUSTOM FIELDS) -CUSTOMIZABLE TEMPLATES -REPORT CREATION TOOLS-REPORT DISTRIBUTION SYSTEM.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

Pipeliner has robust customization features that do not require any technical expertise to leverage.

### 1.8.2

**SEARCH CAPABILITIES** THE SOLUTION HAS ADVANCED SEARCH CAPABILITIES AND PROVIDES THE SUPPORT FOR ABILITIES SUCH AS-FREQUENTLY ASKED QUESTIONS (FAQ) -TREE-BASED SEARCH -FULL TEXT SEARCH -SEARCHING ON DOCUMENT ATTRIBUTES -NATURAL LANGUAGE QUERIES -CASE-BASED REASONING -REFINING EXISTING SEARCHES.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

Pipeliner has robust customization features that do not require any technical expertise to leverage.

## 1.9 MOBILE SUPPORT

### 1.9.1

**REAL-TIME REMOTE ACCESS** THE SOLUTION ALLOWS THE FIELD SERVICE WORKERS TO BENEFIT FROM REAL-TIME ACCESS TO CRITICAL CRM DATA WHILE THEY ARE SERVICING CUSTOMERS OR TRAVELING.

HIGH PRIORITY



**Fully Supported Out of the Box (100)**

Yes.

### 1.9.2

**SUPPORTED DEVICES AND PROTOCOLS** THE SOLUTION SUPPORTS VARIOUS MOBILE DEVICES AND THE PROTOCOLS ON WHICH THEY ARE RUNNING INCLUDING IOS, ANDROID AND OTHERS.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

Pipeliner has a very advanced Mobile App - it is for IOS and Android and includes Artificial Intelligence components (no other mobile CRM app has built-in AI) plus it includes a card scanner, voice to text, and other efficiency and highly visual features.

HIGH PRIORITY

**1.9.3**

**DATA SYNCHRONIZATION** THE SOLUTION ALLOWS WIRELESS SYNCHRONIZATION THAT AUTOMATICALLY UPDATES CONTACT NAMES, ADDRESSES, AND PHONE NUMBERS AS WELL AS TASK LISTS, SO THAT THE USERS ALWAYS HAVE ACCESS TO THE MOST CURRENT INFORMATION AT THE OFFICE OR ON THE ROAD.

**Fully Supported Out of the Box (100)**

Yes - seamlessly and automatically.

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## 1.10 SOCIAL MEDIA INTEGRATION

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### 1.10.1

#### INTEGRATION WITH SOCIAL MEDIA

COMMUNITIES THE SOLUTION HAS THE ABILITY TO TRACK POPULAR SOCIAL MEDIA COMMUNITIES SUCH AS LINKEDIN, FACEBOOK AND TWITTER FOR KEY PROSPECT/CUSTOMER CONTACT ACTIVITIES. REAL-TIME ACCESS TO CRITICAL CRM DATA WHILE THEY ARE SERVICING CUSTOMERS OR TRAVELING.

LOW PRIORITY



#### **Moderately Supported Out of the Box (85)**

Pipeliner incorporates those social media elements that allow for such integration.

# 2. KEY REQUIREMENTS

## 2.1 BUSINESS ANALYTICS AND 360-DEGREE VISIBILITY

### 2.1.1

**SALES INTELLIGENCE** THE SOLUTION PROVIDES SALES PERSONNEL WITH ACCESS TO ACCOUNT-LEVEL INSIGHTS, INTENT DATA, AND PROSPECT BEHAVIOR, SO THEY CAN FOCUS ON THE HOTTEST LEADS AND OPPORTUNITIES AND KNOW WHAT THE PROSPECT WANTS TO TALK ABOUT.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

Seamlessly integrates with BI tools.

### 2.1.2

**REVENUE CYCLE MODELING** THE SOLUTION HAS THE ABILITY TO DEFINE THE STAGES FOR HOW LEADS FLOW THROUGH THE REVENUE CYCLE, AUTOMATE THE RULES FOR HOW LEADS MOVE FROM STAGE TO STAGE WITHIN THE PIPELINE, AND PROVIDE AN EASY-TO-UNDERSTAND FRAMEWORK FOR THE SALES AND MARKETING PROCESS.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Seamlessly integrates with BI tools.



## 2.2 CONTACT MANAGEMENT

### 2.2.1

**WORKFLOW AUTOMATION** THE SOLUTION AUTOMATICALLY CREATES AND ASSIGNS CONTACT FOLLOW-UP TASKS TO SALES PERSONNEL AND UPDATES LEAD / OPPORTUNITY STATUS BASED ON PREDETERMINED PROMPTS AND EVENTS SET IN THE CRM SOFTWARE.

LOW PRIORITY



#### **Fully Supported Out of the Box (100)**

Yes, you can set mandatory actions based on the status of a lead or opportunity.

### 2.2.2

**REAL-TIME ACCESS TO CONTACTS** THE SOLUTION ALLOWS MULTIPLE USERS TO SEE CONTACT INFORMATION AT THE SAME TIME AS WELL AS COLLABORATE WITH OTHER DEPARTMENTS AND USERS.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Yes, admins can set user rights to view information plus users themselves can also select those they want to share views of the information with and collaborate with.

### 2.2.3

**FILE SHARING** THE SOLUTION ALLOWS MULTIPLE USERS ACCESS TO FILES PERTAINING TO CONTACTS AND THE CORRESPONDING ACCESS HISTORY.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Yes, admins can set user rights to view information plus users themselves can also select those they want to share views of the information with and collaborate with.

### 2.2.4

**IMPORT DATA** THE SOLUTION ALLOWS USERS TO IMPORT CONTACTS FROM OTHER PROGRAMS INCLUDING EMAIL AND EXCEL INTO THE CRM PROGRAM.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Yes, very straightforward.

## 2.3 CUSTOMER PORTAL

### 2.3.1

MEDIUM PRIORITY

**AUTHENTICATION AND SECURITY** THE SOLUTION SUPPORTS THE FOLLOWING: -PROVIDE USERS WITH ACCESS ONLY TO THE INFORMATION THAT THEY REQUIRE TO DO THEIR JOBS -CATEGORIZE TYPES OF USERS BY ROLE AND RESTRICT ACCESS BASED ON THOSE ROLES -PREVENT USERS FROM ACCESSING OBJECTS THAT THEY DO NOT OWN OR SHARE.



#### **Fully Supported Out of the Box (100)**

Yes, the admin can easily set user rights in the Admin module and define what user types have access to what - plus where they are in the hierarchy that is setup dictates some of this - if you are in a division you may only be able to see that division information but if you are in the parent company you see everything.

### 2.3.2

HIGH PRIORITY

**PERSONALIZATION** THE SOLUTION OFFERS PERSONALIZED CONTENT AND VIEWS TO ITS USERS. IT PROVIDES A COMPREHENSIVE 360-DEGREE VIEW OF CUSTOMER INTERACTIONS FOR THE TARGET ORGANIZATION, SUCH AS SALES LEADS, OPPORTUNITY STATUS, AND CONTRACTS, AS WELL AS CUSTOMER AND EMPLOYEE REPORTED CASES, AND SERVICE ORDERS.



#### **Fully Supported Out of the Box (100)**

The multiple ways of viewing Opportunities, Leads, Accounts and Contacts make Pipeliner the easiest system to quickly see everything you need - plus the Power Panel that is available in every view allows users to customize the view, save it and even share it - the flexibility in viewing data in so many different ways is excellent.

### 2.3.3

**CUSTOMER FORUMS** THE PORTAL HAS ACTIVE CUSTOMER FORUMS AND COMPREHENSIVE Q&A SECTIONS WHERE COMMON CUSTOMER QUERIES ARE ANSWERED.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

Pipeliner has a roust knowledgebase and a chat system to support customer queries and provide help plus we provide help tours and tutorials in the product itself.

### 2.3.4

**SALES KNOWLEDGEBASE** THE SOLUTION PROVIDES A KNOWLEDGEBASE WITH THE ABILITY TO UPLOAD AND SHARE CUSTOMER ACQUISITION PLAYBOOKS, SALES OPERATIONS BEST PRACTICES, AND ASSOCIATED COLLATERAL WITH BUILT-IN SEARCH CAPABILITIES.

MEDIUM PRIORITY



#### **Fully Supported Out of the Box (100)**

Yes, documents can be added to any entity plus you can add relevant documents to individual sales stages so they are accessible at the right time in the sales process.

### 2.3.5

**CUSTOMER INTERACTIONS** THE PORTAL SHOWS ALL THE INTERACTIONS THAT ANYONE FROM THE ORGANIZATION HAS WITH TARGET PROSPECTS AND CONTACTS.

HIGH PRIORITY



#### **Moderately Supported Out of the Box (85)**

Moderately Supported Out of the Box (85)

## 2.4 MARKETING AUTOMATION REQUIREMENTS

### 2.4.1

**LEAD DISTRIBUTION** THE SOLUTION AUTOMATICALLY ASSIGNS AND DISTRIBUTES QUALIFIED LEADS TO DISPARATE SALES TEAM MEMBERS AND CHANNEL PARTNERS TO ENABLE A MORE COMPREHENSIVE AND COLLABORATIVE SALES PROCESS. THE SOLUTION ALSO TRACKS ONGOING ACTIVITIES THROUGH FROM INITIAL REACH-OUT TO CONTRACT TO ENHANCE VISIBILITY AND PRODUCTIVITY, AND IMPROVE RESULTS.

LOW PRIORITY



#### **Moderately Supported Out of the Box (85)**

Lead distribution rules can be set up.

### 2.4.2

**LEADS UPLOADING - API** THE SOLUTION ALLOWS LEADS TO BE UPLOADED INTO THE SYSTEM FROM EXTERNAL SOURCES VIA A WEB SERVICES API CALL.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

Pipeliner has an open API.

HIGH PRIORITY

**2.4.3**

**LEADS UPLOADING - EXCEL** THE SOLUTION  
ALLOWS LEADS TO BE UPLOADED INTO THE SYSTEM FROM  
EXTERNAL SOURCES VIA EXCEL.

**Fully Supported Out of the Box (100)**

Very simple.

HIGH PRIORITY

**2.4.4**

**LEAD FOLLOWUP REMINDERS** THE SOLUTION  
ALLOWS THE USERS TO SET REMINDERS TO FOLLOW UP WITH  
LEADS OR CREATE AUTOMATED EMAIL MESSAGES TO GO OUT AT  
SET TIMES.

**Fully Supported Out of the Box (100)**

Alerts and reminders can be activated by users - when they want to be reminded, how often etc.

## 2.5 REPORTING REQUIREMENTS

### 2.5.1

**CUSTOM REPORTS** THE SOLUTION ALLOWS USERS TO CREATE CUSTOM REPORTS TO ENABLE VISUALIZATION OF DESIRED DATA.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

The Pipeliner reporting section provides Standard, Advanced Reports, Pivot tables, dashboard reports, plus in most views you immediately generate a custom report.

### 2.5.2

**REPORTING TOOLS** THE SOLUTION PROVIDES SEVERAL TOOLSETS WHICH CAN BE UTILIZED TO DEVELOP ADVANCED REPORTS WITHOUT ANY PROGRAMMING OR SQL KNOWLEDGE.

HIGH PRIORITY



#### **Fully Supported Out of the Box (100)**

None of the Pipeliner reports require programming knowledge and you can create very complex reports with the Advanced Reporting feature.

HIGH PRIORITY

## 2.5.3

**DASHBOARDS** THE SOLUTION PROVIDES REPORTS AND DASHBOARDS THAT SHOW REAL-TIME INFORMATION ABOUT LEADS, OPPORTUNITIES, AND ACCOUNTS. DASHBOARD ACCESS IS LIMITED TO SPECIFIC USER PROFILES SO TEAM MEMBERS SEE ONLY THE INFORMATION THEY NEED TO KNOW.



### **Fully Supported Out of the Box (100)**

Pipeliner has very robust dashboard reports - there are a standard set of dashboard reports available in the Reporting section PLUS users can immediately generate a dashboard report from almost any view they are in within the system. Access rights can be controlled.



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## 2.6 SALES TRACKING & MANAGEMENT

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### 2.6.1

HIGH PRIORITY

**SALES ACTIVITY REPORTS** THE SOLUTION ALLOWS USERS TO GENERATE REPORTS THAT SHOW THE SALES ACTIVITY FOR THEIR COMPANIES.



#### **Fully Supported Out of the Box (100)**

Pipeliner has a robust Activity Management view where users and managers can view Activities on a Calendar, on a Tasks Board, or on a List view - recurring tasks can be automated, task can be reported on and they can be made mandatory within a sales stage.

## 2.6.2

HIGH PRIORITY

**OPPORTUNITY MANAGEMENT** THE SOLUTION DISPLAYS ALL THE OPPORTUNITIES INSIDE THE SALES PIPELINE NEATLY ARRANGED ACCORDING TO THEIR PHASE IN THE SALES CYCLE. THIS APPROACH LETS THE USER FOCUS ON THE MOST PROMISING OPPORTUNITIES AND LEADS TO ACHIEVEMENT OF SALES TARGET GOALS. OPPORTUNITY MANAGEMENT INVOLVES END-TO-END TRACKING, DEAL ROUTING, AND TRACKING OF PRODUCTS, MILESTONES, AND COMPETITORS.



### Fully Supported Out of the Box (100)

Pipeliner CRM offers an easy way to customize your opportunity pipeline, including length of stage, percentage to close, plus actions and activities that need to be taken within a stage (can be mandatory or suggested) plus you can have multiple pipelines - a different sales process for a different type of sale for instance. Plus Pipeliner offers four different views of the pipeline (pipeline view, bubble chart view, compact view and list) - plus users can use the profile feature to customize, save and share views based on the criteria they want to see (by owner, by amount, by priority, by date range etc.). Pipeliner includes a Buying Center feature in Opportunities where a user can visually map out who is influencing the sales (Decision Maker, Influencer, Consultant, Naysayer etc). This is a feature that other CRMs do not have and has to be bought as a third-party add-on.

## 2.6.3

MEDIUM PRIORITY

**SALES AUTOMATION** THE SOLUTION ALLOWS USERS TO SET THE SYSTEM TO AUTOMATICALLY PERFORM SALES RELATED TASKS SUCH AS LEAD TO OPPORTUNITY CONVERSION, PIPELINE ANALYSIS, REVENUE FORECASTING, AND OTHER SALES MANAGEMENT FUNCTIONS.



### Moderately Supported Out of the Box (85)

HIGH PRIORITY

**2.6.4**

**FORECASTING TOOLS** THE SOLUTION PROVIDES SALES FORECASTING TOOLS THAT ALLOW USERS TO PREDICT DEVELOPMENTS IN SALES, AND THE ASSOCIATED EXPECTED REVENUE ON A MONTHLY/QUARTERLY/ANNUAL BASIS.

**Fully Supported Out of the Box (100)**

The Target feature allows the user to quickly change from one forecast view to another - for example they could look at the current quarter and look at the target unweighted with all the opportunities values included regardless of stage, or Weight looking at them by stage weighting, or look at them by Ranked which is the subjective ranking of the salesperson or Balanced which combines ranking and weighted. Also we offer a robust forecast report where forecast and performance against forecast can be monitored, and updated dynamically.

HIGH PRIORITY

**2.6.5**

**SALES COLLABORATION** THE SOLUTION ALLOWS MULTIPLE SALES TEAMS AND ASSOCIATES TO ACCESS IMPORTANT CONTACT INFORMATION IN THE SYSTEM AND DEVELOP A SALES STRATEGY FOR A TARGETED GROUP OR SPECIFIC LEAD.

**Fully Supported Out of the Box (100)**

Depending on what access the admin or the record owner wants to give someone, teams, managers and individuals can view opportunities, collaborate in discussing them, provide insight, be alerted to changes, and generally engage in team work - this is a very powerful feature of Pipeliner.

HIGH PRIORITY

## 2.6.6

**ACCOUNT MANAGEMENT** THE SOLUTION PROVIDES AN ACCOUNT MANAGEMENT FEATURE THAT GIVES BUSINESSES THE CAPABILITY TO MANAGE THE RELATIONSHIPS THEY HAVE WITH OTHER COMPANIES. FROM AN ACCOUNT, USER SHOULD BE ABLE TO PERFORM COMMON FEATURES SUCH AS VIEW ACTIVITIES, APPOINTMENTS, CONTACTS, CONTRACTS, DOCUMENTS, EMAILS, EVENTS, NOTES, OPPORTUNITIES, QUOTES, SALES DATA, SUPPORT ITEMS, OR TASKS THAT ARE ASSOCIATED WITH THE ACCOUNT OR WITH ANY OF THE CONTACTS AT THE ACCOUNT.



### Fully Supported Out of the Box (100)

The Account view works the same as the Contacts view and the Leads view - A compact view with all high level data displays, click to go into detailed view and then also a Map and a lead view - the Account section also includes visual Org Chart capability out of the box so users can map out the customer org structure.

HIGH PRIORITY

## 2.6.7

**CONTACT MANAGEMENT** THE SOLUTION PROVIDES CONTACT MANAGEMENT FEATURES THAT ALLOW THE USERS TO EASILY CREATE CONTACTS AND VIEW CONTACT INFORMATION IN A CONSOLIDATED WAY. THE SOLUTION ALSO ALLOWS USERS TO TRACK ALL INTERACTIONS, SCHEDULE APPOINTMENTS, MANAGE TO-DO ITEMS, SUPPORT SALES METHODOLOGY, AND MAINTAIN COMMUNICATIONS WITH THE CONTACTS.



### Fully Supported Out of the Box (100)

Users can immediately see the most important Contact info in a Compact View and then go further into a detailed view if they choose - again the visual elements make it easy to see when the contact last interacted, what opportunities/leads are associated with them, all the interactions with them (meeting, emails etc) - users can also select a map view that shows where the contacts are located and also a list view for ease of scrolling through contacts - Multiple ways of looking at contact data to allow users to choose what works best for them.

# 3. TECHNICAL FEATURES

## 3.1 AVAILABILITY & SCALABILITY

### 3.1.1

**SCALABILITY** THE SYSTEM CAN EASILY SCALE TO SUPPORT CHANGING THROUGHPUT.

HIGH PRIORITY



**Fully Supported Out of the Box (100)**

### 3.1.2

**HIGH AVAILABILITY** THE SYSTEM PROVIDES FOR HIGH AVAILABILITY THROUGH MEANS SUCH AS REDUNDANT BACKUP SERVERS, CLOUD NODES, OR OTHER METHODS.

HIGH PRIORITY



**Fully Supported Out of the Box (100)**

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## 3.2 DEVELOPMENT ENVIRONMENT

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### 3.2.1

**HOSTED INSTALLATION** THE SYSTEM IS AVAILABLE AS A HOSTED, SOFTWARE AS A SERVICE (SAAS) OFFERING.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

## 3.3 DEVELOPMENT ENVIRONMENT

### 3.3.1

#### STANDARD SCRIPT/PROGRAMMING

**LANGUAGE** THE SOLUTION SUPPORTS A STANDARD PROGRAMMING LANGUAGE FOR ADVANCED CUSTOMIZATIONS. IDEALLY, IT SHOULD BE DRAG-AND-DROP (WITHOUT PROGRAMMING KNOWLEDGE), VIA API (INDEPENDENT OF PROGRAMMING LANGUAGES), OR ALLOW THE USERS TO DEVELOP APPLICATIONS IN ANY PROGRAMMING LANGUAGE (JAVA, .NET, C/C++, PHP, ETC.).

MEDIUM PRIORITY



#### Fully Supported Out of the Box (100)

Drag and drop.

### 3.3.2

**INDUSTRY-SPECIFIC CUSTOMIZATION** THE SOLUTION HAS UNIQUE CUSTOMIZATION OPTIONS AND CAN HELP USERS TARGET MANY DIFFERENT INDUSTRY TYPES THAT GO BEYOND TRADITIONAL SALES AND MARKETING SUCH AS HEALTHCARE, FINANCIAL SERVICES, EDUCATION, AND MORE.

MEDIUM PRIORITY



#### Fully Supported Out of the Box (100)

Pipeliner's admin module is easy to customize, drag and drop, visual, and does not require technical resources.

## 3.4 FAULT TOLERANCE

### 3.4.1

**BACKUPS AND SNAPSHOTS** THE SYSTEM PROVIDES TOOLS TO AID IN CREATING ROUTINE DATA BACKUPS AND POINT-IN-TIME SNAPSHOTS TO PROTECT AGAINST DATA LOSS.

HIGH PRIORITY



**Moderately Supported Out of the Box (85)**

### 3.4.2

**DATA RESTORATION** THE SYSTEM PROVIDES TOOLS TO AID IN RESTORING SYSTEM DATA FROM A BACKUP OR SNAPSHOT TO FACILITATE RECOVERY.

HIGH PRIORITY



**Moderately Supported Out of the Box (85)**



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## 3.5 INTEGRATION

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### 3.5.1

**API/WEB SERVICE** THE SYSTEM PROVIDES AN API (APPLICATION PROGRAMMING INTERFACE), WEB SERVICES, AND OTHER MEANS FOR CUSTOM INTEGRATION WITH OTHER SYSTEMS.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

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## 3.6 SECURITY

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### 3.6.1

**ACCESS CONTROL** THE SYSTEM ENABLES USER AND/OR ROLE BASED PERMISSIONS TO BE CONFIGURED IN ORDER TO CONTROL WHAT SYSTEM FEATURES AND DATA USERS CAN ACCESS.

MEDIUM PRIORITY



**Fully Supported Out of the Box (100)**

Easy to configure by admin.

To request a custom price quote for any of  
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