



# Process Templates

Faster onboard & adoption,  
really easy to import and  
customize.

ENTERPRISE MANAGEMENT SOFTWARE

CRMs

Helpdesk

Task  
Management

Internal  
Workflows

Others...

Several Months

Painful

Expensive

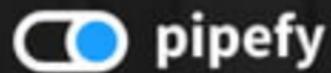


## IT Support

**1x** on Software licences

**3x** on IT support

to implement, customize and maintain



The **easy button**  
for processes and workflows



### Reimbursement

24545 downloads



### PR Campaign

24545 downloads



### Holiday Request

24545 downloads



### Purchase Process

24545 downloads



### Sales Pipeline

24545 downloads



### Procurement

24545 downloads



### Helpdesk

24545 downloads



### Hiring Process

24545 downloads



### Product Roadmap

24545 downloads



### Bug Tracking

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The screenshot displays a CRM interface for a sales pipeline. The main header is blue and reads "Now on Send Proposal" with a sub-header "3 days in this phase". Below this, there are several form fields and sections:

- A text input field with the value "10000.00" and the label "What's the entire amount proposed?".
- A date picker with the value "09/23/2019" and the label "The date you sent out the proposal".
- Another date picker with the value "09/23/2019" and the label "Follow-up on...".
- An attachment section titled "Attach here the proposal sent" showing a file named "welcome proposal.xls".
- A blue button labeled "+ ADD FILE".
- A text input field with the placeholder "Write a comment".

On the right side, there is a dark sidebar titled "Choose Next Step" with four buttons:

- Green button: "Move to Under negotiation" with a right arrow.
- Green button: "Move to Lost" with a right arrow.
- Green button: "Move to Won" with a right arrow.
- Red button: "Move to Qualify" with a left arrow.

 **pipefy** Template Directory

MARKETING & SALES

## Sales Pipeline Template

This Sales Pipeline Process Template is a step-by-step workflow that enhances your team's focus and productivity by guiding them through all the steps of the sale, from prospecting, to qualifying properly hot and cold opportunities to close the deal.



**Import this template now!**

**6** months

**12,000+** companies

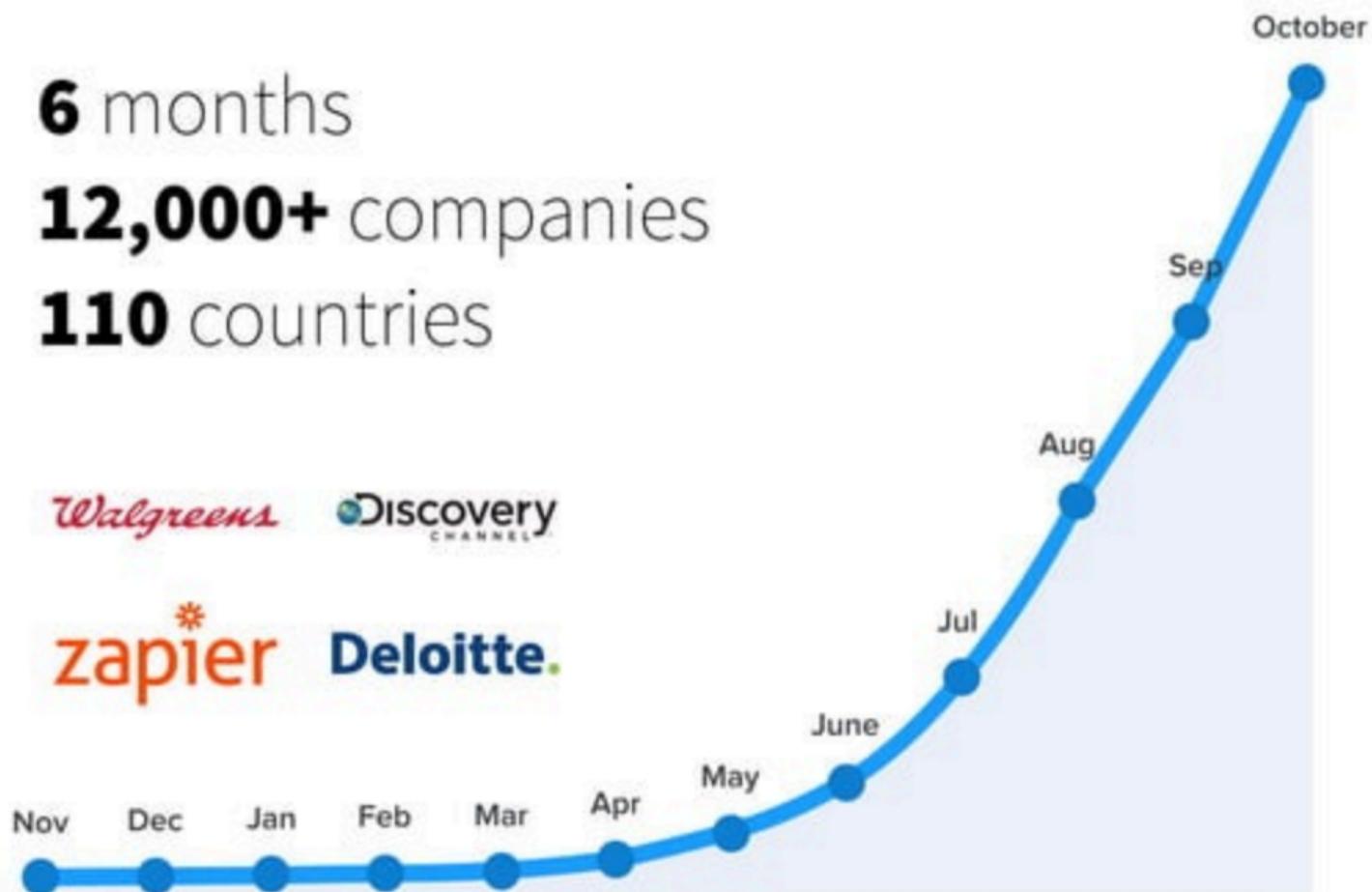
**110** countries

*Walgreens*

Discovery  
CHANNEL

*zapier*

Deloitte.





**Alessio Silva Alionço**

Previous Successful Exit



**Leandro Johann**

+20 years on ERP & BPM & CRM  
(Microsoft + Salesforce + TOTVS)