

How to set up your **pipedrive**

“We help salespeople focus on
actions that close deals”

Contents

What is Pipedrive?	1
Terminology	2
Customization	3
✓ Pipeline and Stages	3
✓ Custom fields	5
✓ Custom Activity types	8
✓ Custom filters	9
✓ Users and Visibility	12
Importing your data	14
✓ From another CRM	14
✓ From a spreadsheet	15

What is Pipedrive?

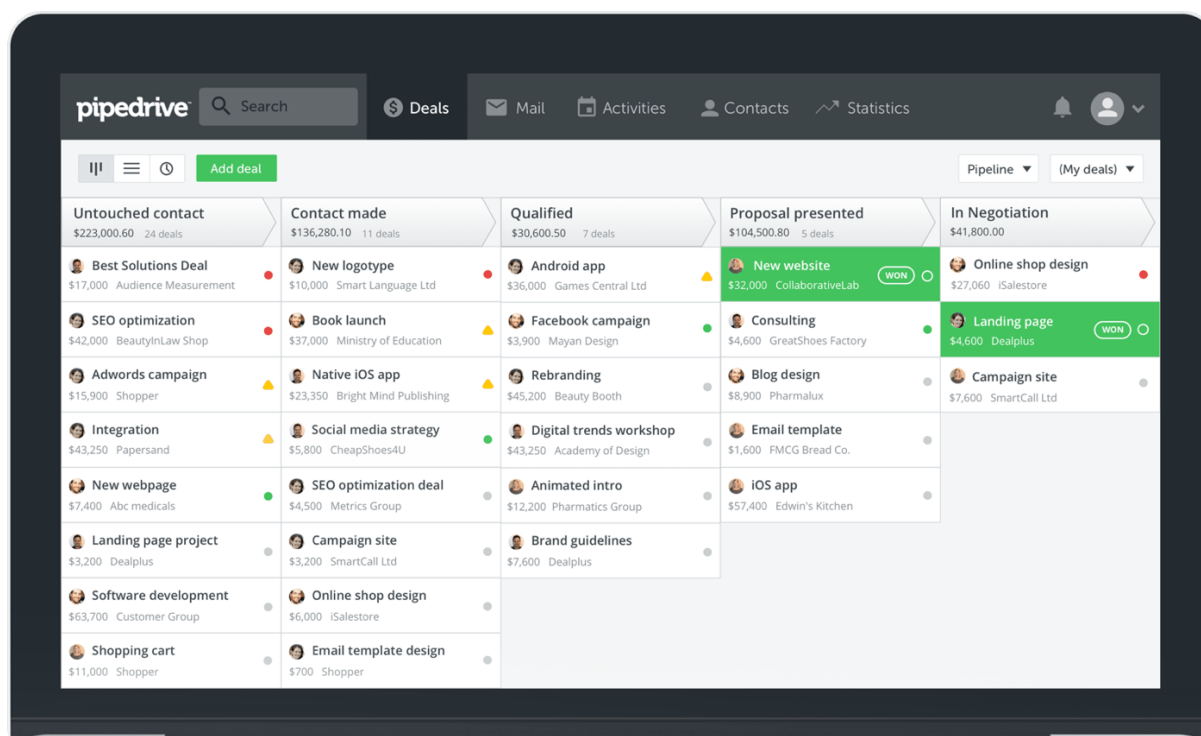
Pipedrive is a sales management tool designed to help small sales teams manage intricate or lengthy sales processes.

Our main focus here at Pipedrive is Activity-based sales processes.

Activity-based selling is the idea of winning a sale through the outcome of a chain of activities. Salespeople aren't always sure where to spend their time, and often get lost in day-to-day "busyness" instead of following activities that are truly meaningful to the sales process.

Pipedrive ensures that our customers are always on top of what is going on with their sales and what they need to do next.

Check out this blog post from Timo Rein (CEO and Co-founder of Pipedrive) on how to adapt your sales to activity-based selling: [The Ultimate Guide to Activity-Based Selling](#).

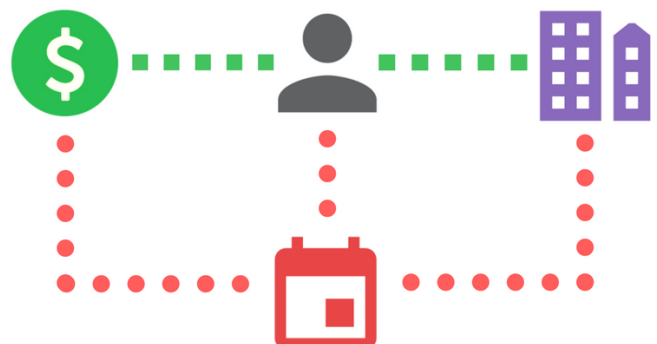


Pipedrive's Terminology

How is data organized in Pipedrive?

One of the key things when starting to use Pipedrive is to understand its terminology.

- ✓ **People** and **Organizations** are your contact database. These store all related long-term information such as phone numbers and email addresses. These contacts can be linked together; an organization can have multiple people linked to it.
- ✓ **Deals** represent the interactions you're having with customers. They are linked to a person and/or an organization. They're tracked through the stages of the sales pipeline as they progress. They also document all actions (such as activities and email conversations) taken to close the sale from start to finish.
- ✓ **Activities** are scheduled tasks needed to close a sale and can be associated with People, Organizations, or Deals.

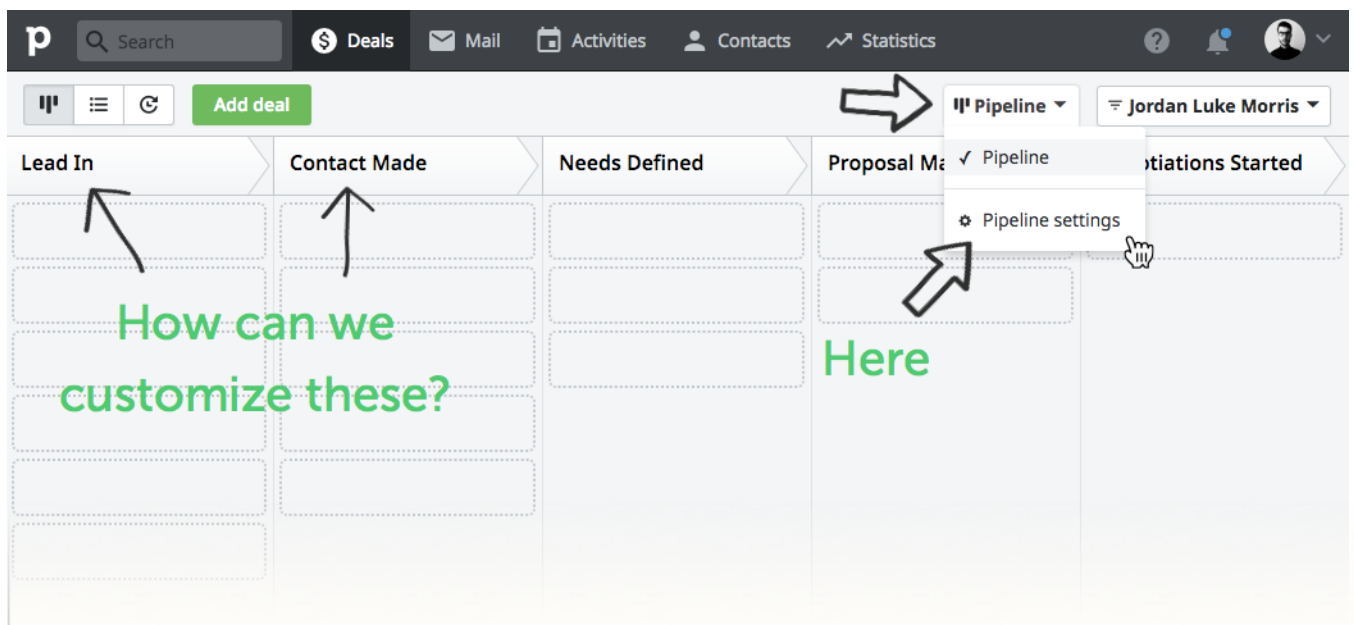


First things, first...

Customization

The Pipeline and its Stages

The first thing you are going to want to do when you start out in Pipedrive is to adjust the Pipeline settings to your business. You can do this in two ways; directly from the Pipeline view (like below) or from Settings > Pipelines.



Once you are on the Pipeline settings page, you will be able to edit the name of your Pipeline and its Stages.

- ✓ Click on the name of the stage (in blue text) to edit it.
- ✓ Click "Add stage" on the right to add more, although we usually recommend that you keep your sales pipeline between 4-6 stages.

Customize sales stages !

Pipeline Edit

Lead In → **Contact Made** → **Needs Defined** → **Proposal Made** → **Negotiations Started**

Add stage

About sales stages

Here you can customize the sales stages for your company.

Please bear in mind that sales stages are shared with all users throughout your company.

Sales stages should be simple, work-flow based, and resemble the activities that need to be accomplished with deals in each stage.

Here's an example of well defined sales stages:
Prospect Contacted › Pain Discovered › Need Specified › Solution Accepted › Price Negotiated

You can re-order the stages on this page by dragging them around and add more stages by clicking the **Add stage** button.

To rename or delete an existing stage, click on the stage name.

Do not use „Won“ or „Lost“ as sales stages since you can close deals to these stages by default (you can do this inside a specific deal page).

- ✓ From here you can also add more pipelines, but check out this support article first on why adding more pipelines might be a good or bad idea, depending on the situation: [Multiple-pipelines & why you should \(or should not\) use them](#)

And your Pipeline is done!

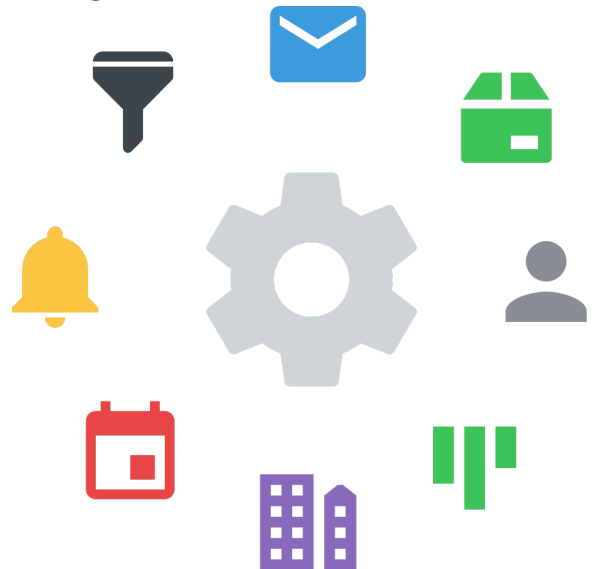
If you are having difficulties deciding what stages you need in your sales process, then read this blog post from Urmas Purde (Co-founder of Pipedrive) on: [How to build a sales pipeline? The 4-step guide](#)

Custom fields

Pipedrive comes with a minimalist's approach to CRM; this quite sufficient for most people, but let's assume there's more you'd like to have documented than basic names and numbers. This is when custom fields come into play.

By default, Pipedrive comes with the basic fields, including:

- ✓ Deal title
- ✓ Deal value
- ✓ Contact person name
- ✓ Contact person email
- ✓ Contact person telephone
- ✓ Organization name
- ✓ Organization address



If this is not enough for your business, then you can add more fields using custom fields. To access the custom fields settings page, go to Settings > Customize fields.

Customize deal fields Add a field

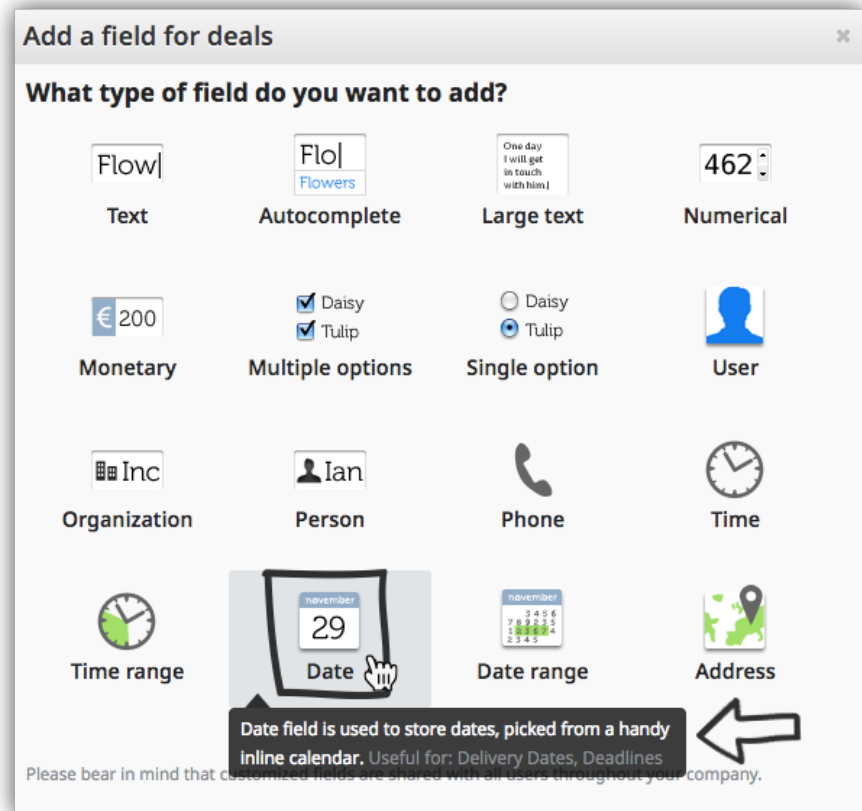
Deals Organizations People

Field name	Type	Show in Add New dialog	Important	Field API key
Title	Text			title
Creator	User			creator_user_id
Owner	User			user_id
Value	Monetary			value
Organization	Organization			org_id
Pipeline	Numerical			pipeline
Contact person	Person			person_id
Stage	Stage in the Pipeline			stage_id

Make sure you select the correct tab before adding

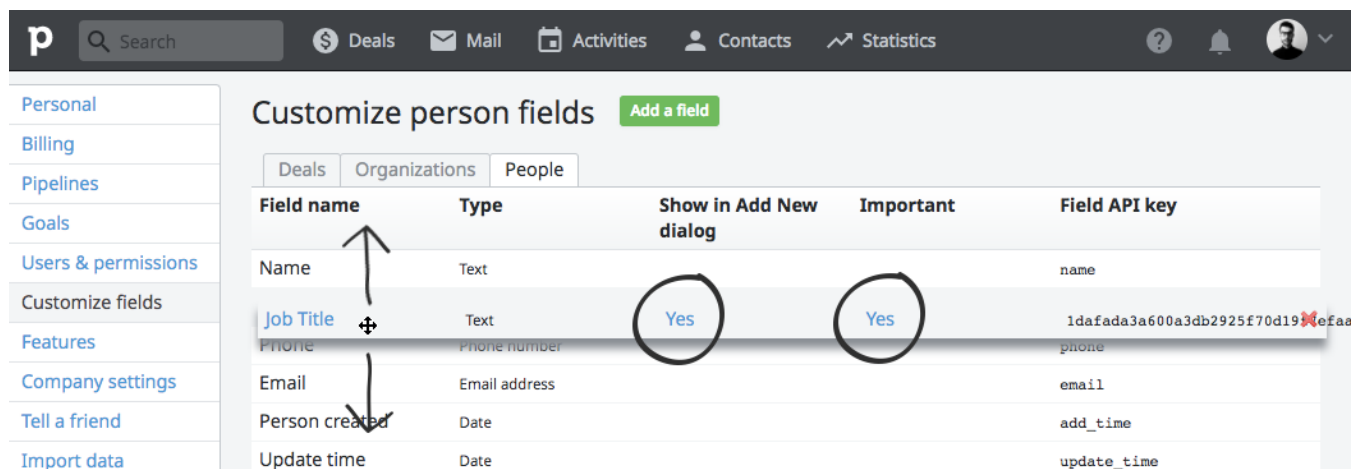
Once you have clicked on “Add field” you will see this screen below where you can choose the type of field you want to create.

Hover over the field type for a brief explanation and examples

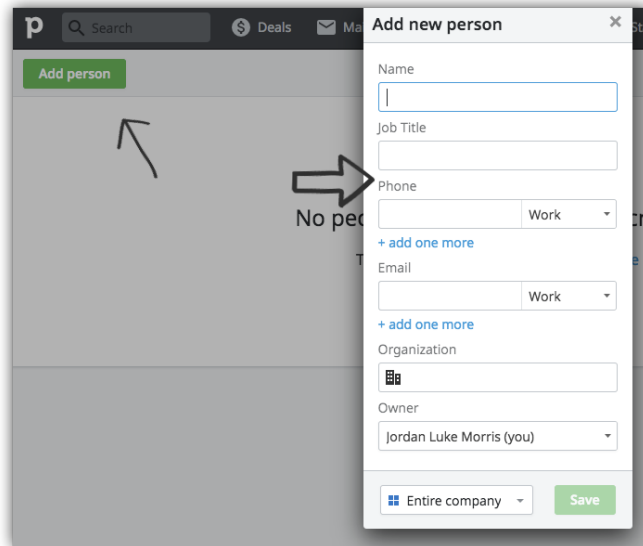


Note: All custom fields are shared with all users throughout your company.

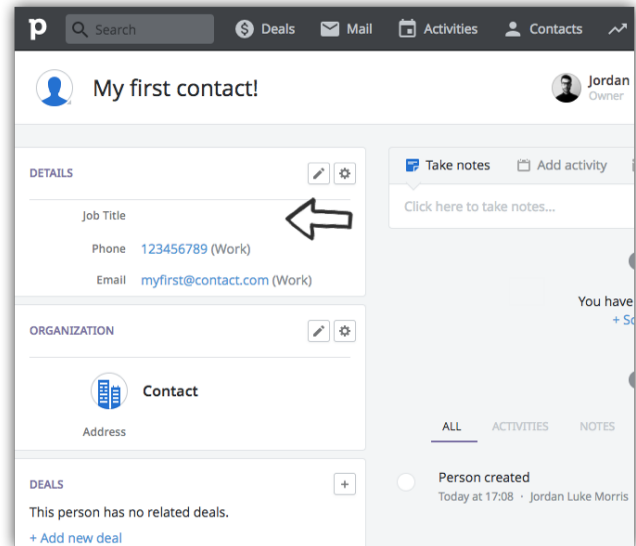
Once you have created your fields you can reorder them by click-and-drag in the list. You can also mark them with “Yes/No” under Show in Add new dialog and/or Important.



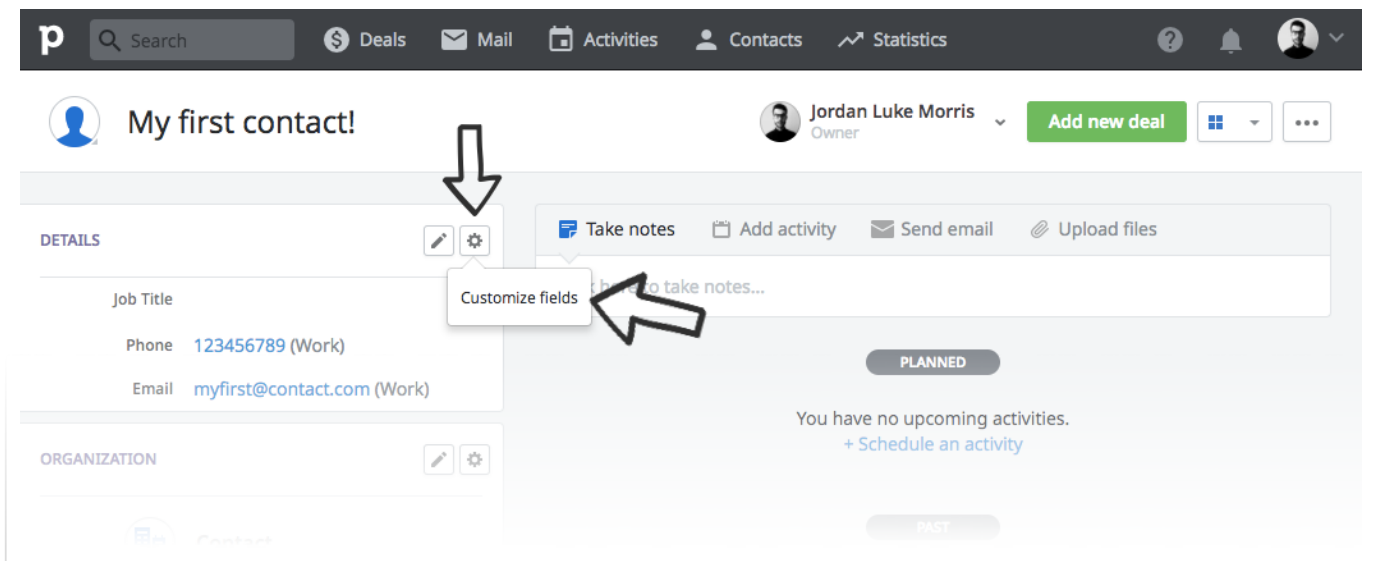
- ✓ If you mark a custom field as Show in Add new dialog, then it will prompt you to fill out this field when adding that item (deal/person/organization).



- ✓ If you mark a custom field as Important, then it will always be visible in the Details section of the item even if it is not filled out.



Tip: Customization is also possible from any details page by clicking on the Gear icon > Customize fields. From here you can also add, move, edit and remove custom fields.



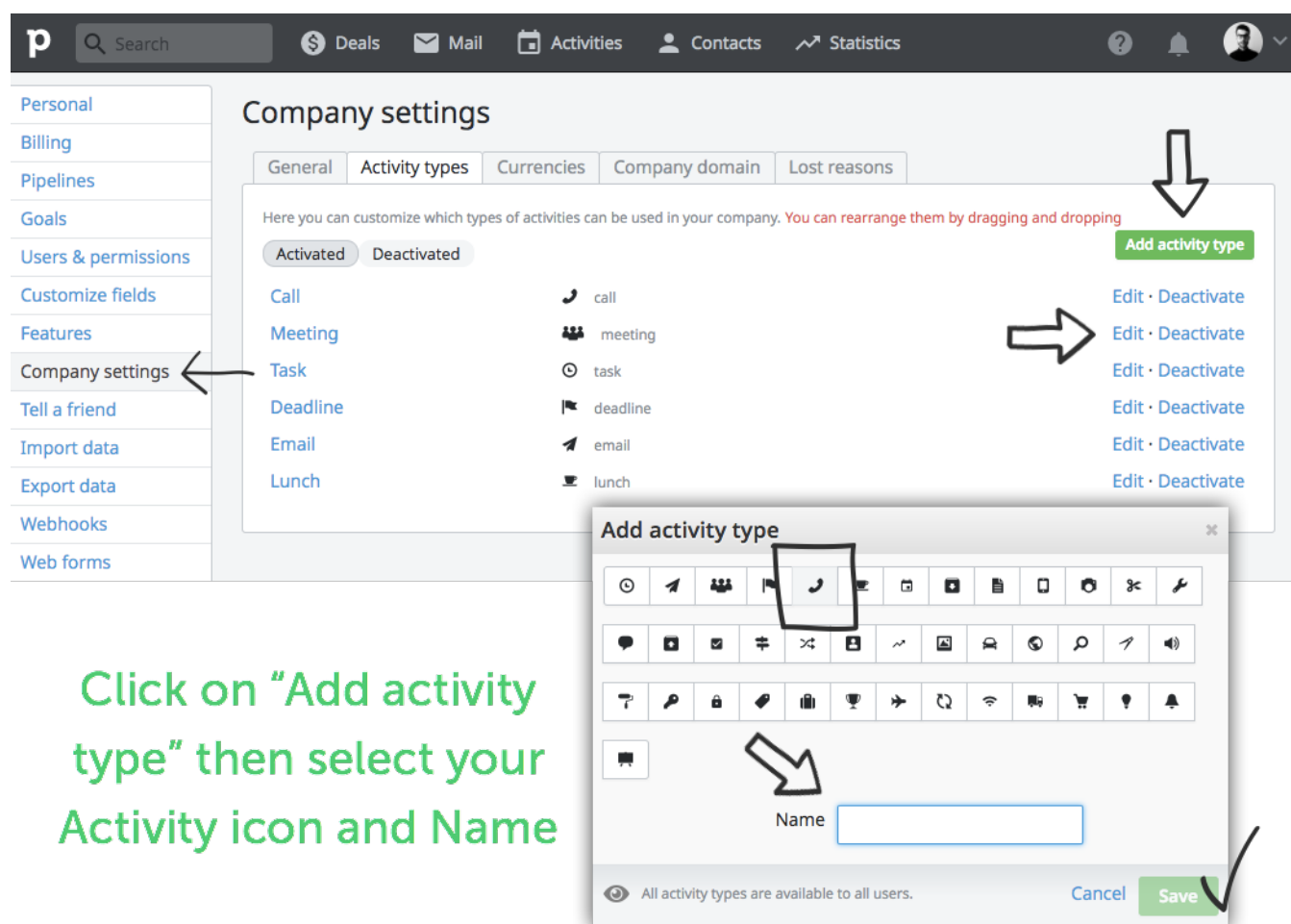
For additional information then check out our support article on [Customs fields](#).

"Pipedrive's strengths lie in its ease of use and customizability"

Custom Activity types

Pipedrive prides itself as being the tool for activity-based selling therefore custom activity types is a must-have feature.

To change the Activity types of your Pipedrive account, you will need to go to Settings > Company settings > Activity types. Here you can add, edit, rearrange and deactivate all your activity types. Rearrange your activity types by click-and-dragging in the list.

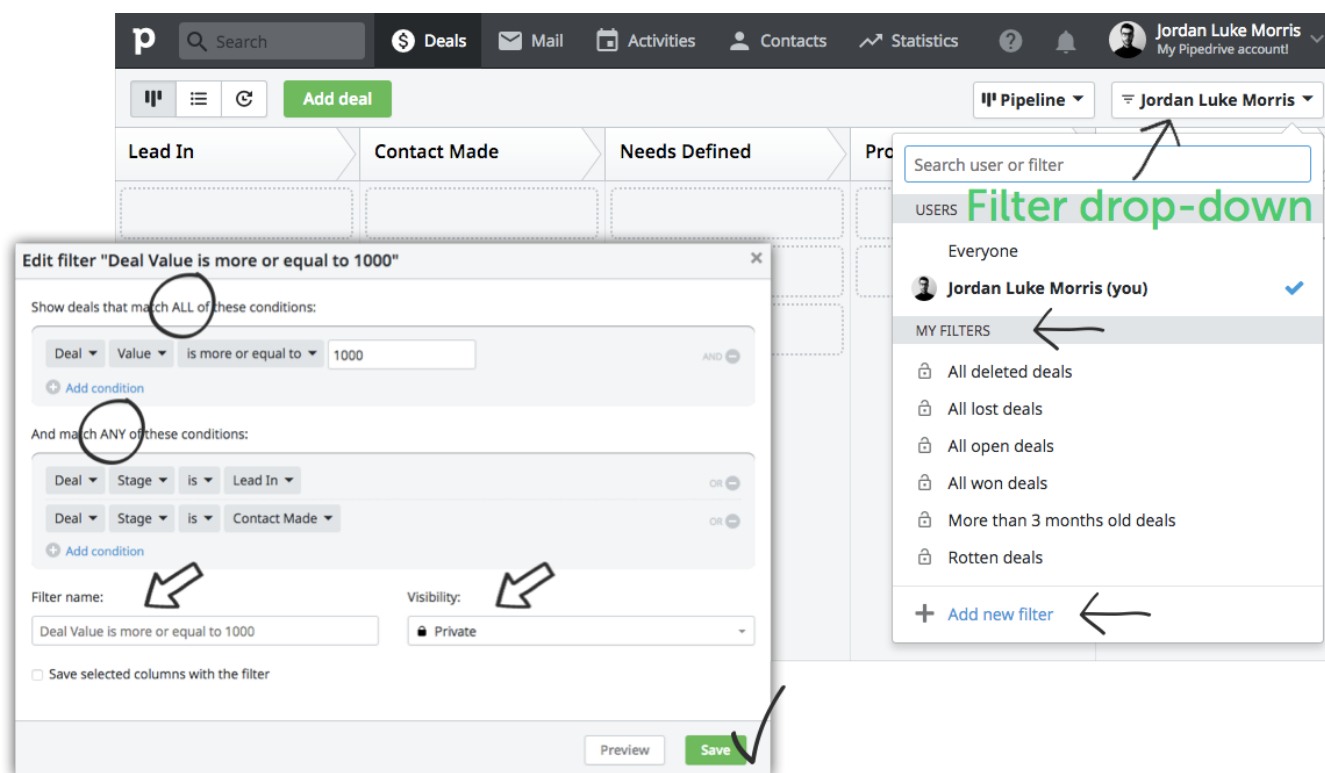


Click on "Add activity type" then select your Activity icon and Name

Custom filters

Pipedrive can filter your deals, people, organizations and activities by almost any type of criteria you can imagine, giving you visibility on exactly what you need.

Just click on the filter drop-down to select one of Pipedrive's pre-configured filters, or to create your own custom filters.



You can create two kinds of filtering conditions ('and'/'or' conditions):

- ✓ If you want the filtered list to match all of the defined conditions, define them under the "Only show items that match **ALL** of these conditions" title.
- ✓ If you want to define multiple conditions, so that the results match at least one of the defined conditions, define the filtering conditions under the "Only show items that match **ANY** of these conditions" title.

Tip: You can also add conditions related to your custom fields.

✓ Add a name to your custom filter.

✓ And set your filter visibility settings.

Filter name:

Visibility: Shared

✓ Save selected columns with the filter

Private
Only the creator can see this filter

Shared
All users in the company can see and use this filter

Preview Save

✓ You can choose to tick "Save selected columns with the filter" if you want your filter to always include the columns currently visible in your list view along with the filter. Remember that this option is only available for filters used in the list views.

Note: To add or remove columns from the list view, click on the Gear icon in the top right corner, example below. All your custom fields will also be viewable as columns.

Search Deals Mail Activities Contacts Statistics

Add person 35 people Everyone

All A B C D G H J K L M N R S T

Name	Organization	Email
Harry Potter	Hogwarts School of Witchc...	harry.potter@hogwarts.co
Hermione Granger	Hogwarts School of Witchc...	hermione.granger@hogwa
Ron Weasley	Hogwarts School of Witchc...	ronald.weasley@hogwart
Draco Malfoy	Hogwarts School of Witchc...	draco.malfoy@hogwarts.c
Sirius Black	Order of the Pheonix	sirius.black@hogwarts.co
Nicolas Flamel		nicolas.flamel@hogwarts.
Bathilda Bagshot		
Alecto Carrow	Death Eaters	alecto.carrow@hogwarts.
Cho Chang	Hogwarts School of Witchc...	cho.chang@hogwarts.com
Marcus Flint	Hogwarts School of Witchc...	marcus.flint@hogwarts.co
Godric Gryffindor	Hogwarts School of Witchc...	godric.gryffindor@hogwa
Helga Hufflepuff	Hogwarts School of Witchc...	helga.hufflepuff@hogwar
Bellatrix Lestrange	Death Eaters	bellatrix.lestrange@hogw
Neville Longbottom	Hogwarts School of Witchc...	neville.longbottom@hogw
Luna Lovegood	Hogwarts School of Witchc...	luna.lovegood@hogwarts.com (Work)
Remus Lupin	Order of the Pheonix	remus.lupin@hogwarts.com (Work)

Choose columns

Search

VISIBLE

- ☒ Name Person
- ☒ Organization Person
- ☒ Email Person
- ☒ Phone Person
- ☒ Open deals Person
- ☒ Closed deals Person

NOT VISIBLE

- ☒ Activities to do
- ☐ Done activities

Default Cancel Save

Tip: You can also export your data in Pipedrive from any list view. You can also choose what data to export with the help of your custom filters.

You can export your filter results here

After select the file type you want to export here

Name	Organization	Email	Phone	Activities to do
Alastor "Mad-Eye" Moody	Order of the Pheonix	madeye@pheonix.com (Work)	840303 (Work)	1
Alecto Carrow	Death Eaters	alecto.carrow@hogwarts.com (Work)	897322 (Work)	
Bathilda Bagshot			890002 (Work)	1
Bellatrix Lestrangle	Death Eaters	bellatrix.lestrange@hogwarts.com (W	989004 (Work)	1
Caractacus Burke	Borgin & Burkes	burke@bc		

- ✓ Afterwards a download button will appear. Or you can download any of your export files from Settings > Export data.

It's important to remember that only the columns which are currently visible in the list view will be included in the export file.

For more information on how to maximize the use of your Pipedrive list views and filters, check out this support article: [Bulk editing & filtering \(The List View\)](#).

**"The secret of getting ahead is...
getting started." – Mark Twain**

Users and Visibility

After you have set up your custom fields, activity types and filters, you are going to want to start adding users to the account.

This can be done by going to Settings > Users & permissions and then clicking on add users. The people you invite to your Pipedrive will receive an invitation email. Make sure that they click on the invite link in this email to gain access to your company account.

Users

Click Yes/No to change a user to an Admin

Users Permissions

Activated Deactivated + Add users

Name	Admin	Last action
Jordan Luke Morris (you) jordan.morris@pipedrive.com	Yes	1 day ago

Add users

Use this form to add more users to your company.

Email

First name

Last name

Monthly fee upon the end of trial
€12

Confirm and invite users ✓

+ Add one more user

During your trial adding new users is free

Upon the end of trial your monthly payment for 2 users will be **€24**

There are two types of users in Pipedrive, Admin users and Regular users:

- ✓ Admin users - Have full control and visibility over the entire account, except for private emails. Pipedrive can have as many admin users as you wish.
- ✓ Regular users - Are limited to the permissions that the admin user establishes.

One of the first and most important things to do is establish your company account's default visibility settings. These settings will establish a default visibility rule to every item (deal/person/organization) created in the system.

Users

Users Permissions

Here you can define the permissions for regular users in your company. These settings affect how users within your company interact with each-other's data. These settings are auto-saved as you change them.

The default visibility for all deals added to the system is Owner & followers Entire company

The default visibility for all organizations added to the system is Owner & followers Entire company

The default visibility for all people added to the system is Owner & followers Entire company

Regular users can change the visibility of items Yes No

Regular users can see the names of hidden items Yes No

Regular users can export data from item lists Yes No

Regular users can delete deals Yes No

Regular users can delete activities Yes No

Regular users can see company's statistics Yes No

Default company visibility settings

Regular user permissions

If you set your default visibility settings to “owners & followers”, then these are a few important things to consider:

- ✓ Every item in Pipedrive needs to have an owner. Ownership establishes who owns that item and who gets credited for the win/loss if it's a deal. You can change ownership within the item or from the list view with the “owner” column.
- ✓ You can also add followers to items. This will allow other users to see any items they do not own. You can add followers within the items details page.
- ✓ You can also add followers to users. This combined with the regular user permission “Regular users can see all items of other users they are following - Yes” allows a user to have visibility on all the items owned by another user whom they are following. You can add a follower to another user in Statistics > Personal > Followers.

Need more information? Check out our support article on [Users & Permissions](#).

Setup is done, now...

Importing your data

From another CRM

You might be coming from another CRM and you want to easily migrate your data to your new Pipedrive account. Well, you can. Simply go to Settings > Import data > From another software > then select where you are coming from.

The screenshot shows the Pipedrive web interface. The top navigation bar includes the Pipedrive logo, a search bar, and links for Deals, Mail, Activities, Contacts, and Statistics. The user's name, Jordan Luke Morris, is in the top right. The left sidebar contains a menu with options like Personal, Billing, Pipelines, Goals, Users & permissions, Customize fields, Features, Company settings, Tell a friend, Import data (selected), Export data, Webhooks, Web forms, and Slack integration. The main content area is titled 'Import data' and has two large boxes: 'From another software' (with a blue cloud icon and a hand cursor) and 'From file' (with a grey upload icon). A modal window titled 'Import from another software' is overlaid on the 'From another software' box. It contains a list of CRMs with their logos and 'Import' buttons. The CRMs listed are Base CRM, Batchbook, Capsule CRM, Onepage, Pipedrive (which is circled in red and has a large right-pointing arrow next to its 'Import' button), and Pipeline Deals. Below the 'Import data' section, there is an 'Import history' section with the text 'Import sessions are kept for 90 days, but...'.

Once you have clicked on "Import" then you will be redirected to our third party integration with Import2. You will just need to follow the steps on the import2.com page.

For more information on what is migrated over and the limitations, check out our support article: [Importing from your previous CRM.](#)

From a spreadsheet

You can easily import data to Pipedrive from XLS, XLSX and CSV spreadsheet files. You can import Deals, Organizations, People, Notes, and Activities all at the same time. All the items that are in the same row in your spreadsheet will be linked together during the import.

As this will be your first import, you will be adding new items (deal/person/organization) to Pipedrive. To import your spreadsheet, go to Settings > Import data > From file.

The screenshot shows the Pipedrive user interface. The top navigation bar includes links for Deals, Mail, Activities, Contacts, and Statistics. The left sidebar lists various settings and integrations, with 'Import data' highlighted. The main content area is titled 'Import data' and features two options: 'From another software' and 'From file'. A large arrow points to the 'From file' option. Below this, a modal window titled 'Import data' is displayed, showing a progress bar with three steps: 'Step 1: Upload file', 'Step 2: Mapping', and 'Step 3: Preview and finish'. The 'Step 1: Upload file' section contains a dashed box for file upload, with an arrow pointing to the 'Upload file' button and another arrow pointing to the 'Download and use sample file' link. The text 'Only Excel (.xls and .xlsx) and .csv file types are supported.' is also visible. At the bottom of the modal, there are links for 'Need help?', 'Cancel import', and a 'Next' button.

Download the sample file to use as a guideline

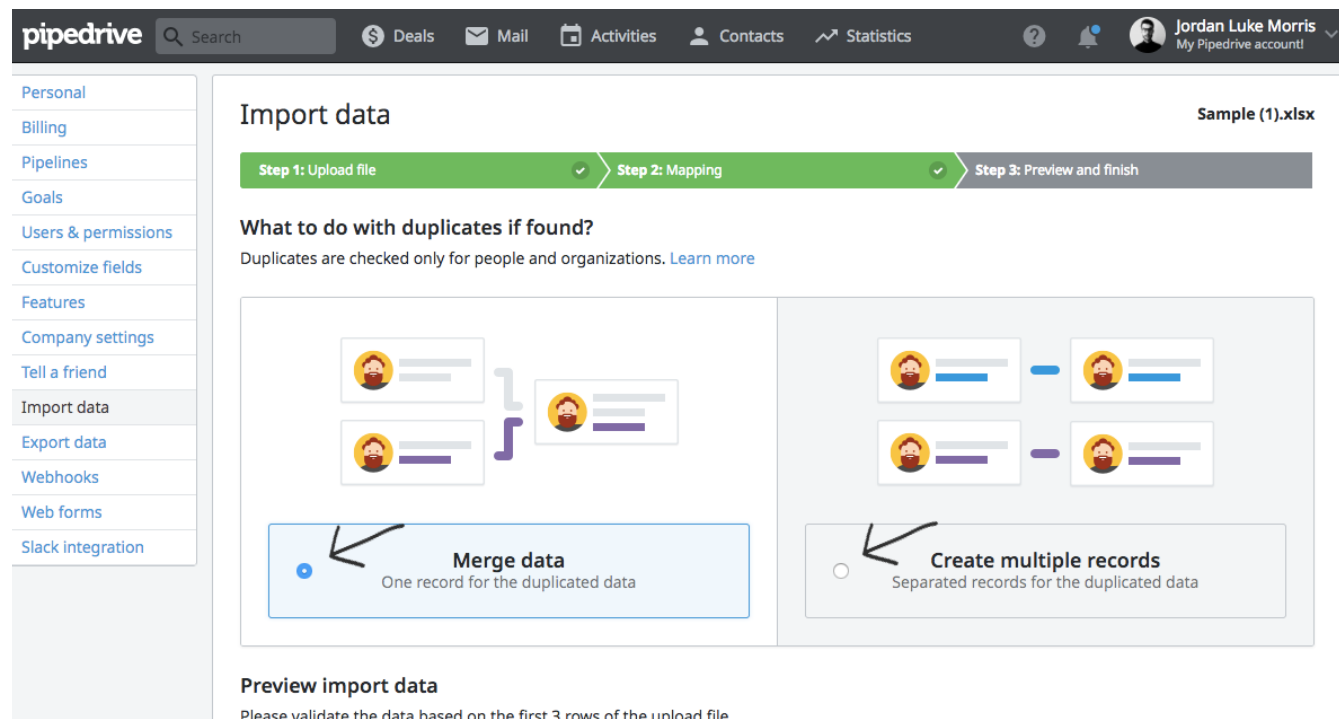
Now all you need to do is map the fields you have in Pipedrive to the columns you have in your spreadsheet, you can also map your custom fields. Click and drag the fields you have in Pipedrive (right) to the columns you have in your spreadsheet (left).

Pipedrive will automatically map most fields for you but make sure to check if these are correct! If any are incorrect then just click on the X to remove them and map the correct ones after.

You might see a yellow triangle next to the field. This means that this field requires some additional micro-mapping, click on it to map the values from Pipedrive with the values you have in your spreadsheet.

Tip: Forgot a custom field? You can go to Settings > Customize fields and create the custom field you need at any time. You can continue your import mapping from where you left off by heading back to Settings > Import data.

Finally, you will be asked if you want to merge any duplicated data in your spreadsheet and with Pipedrive OR to create new separate records. After selecting the desired one, click on Start import and you're done!



How does Pipedrive handle duplicates? Pipedrive looks for the exact same name and one of these conditions:

- ✓ For People, it is Name + Phone / Email / Organization they belong to.
- ✓ For Organizations, Name + Address.

Note: You can still work with Pipedrive while your spreadsheet is importing.

For additional information then check out our support article: [Importing with spreadsheets](#)

Congratulations!

Now you are all set for selling



pipedrive