Fube

GUIDE

How to manage your sales pipeline in Fube



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How to manage your sales funnel in Fube

> An **opportunity** is a sale that hasn't happened yet: it has an estimated amount, a probability of closing and a date on which you expect it to be decided. The **funnel** is the board where you see them all at once, spread across the stage they're in, and where a single figure tells you how much business you can realistically expect.

This guide sets up the funnel from scratch and takes you all the way to that figure. Along the way there are two things that Fube decides for you and that are worth knowing beforehand, because if you don't know about them you'll see figures that don't match what you entered.

Before you start: the CRM is available from Business

Everything this guide covers — leads, opportunities, funnel, activities — lives in the **CRM** module, which **is not included in either the free plan or Pro**. On those two plans, CRM in the side menu doesn't take you to the board: it takes you to a screen that explains what it includes and offers you an upgrade. From **Business** upwards you get all of it. You can see what each plan includes in **pricing**, and what the module does in **CRM and sales funnel**.

Step 1 — Set up your funnel: a pipeline with its stages

A **pipeline** is a sales process with its stages. You can have several (one for new sales and another for renewals, for example) and each one has its own stages.

Go to **CRM › Funnel › Set up pipelines** and create one. Inside it, each stage is defined by the following:

Field	What it's for
Name	What you call it: ‘First contact’, ‘Proposal’, ‘Negotiation’…

Field	What it's for
Type	**Open**, **Won** or **Lost**. This is what decides what happens when you drop a card there
Prob. (%)	The default probability for that stage, from 0 to 100
Days until stalled	Optional. An open opportunity that spends that long in the stage without changes counts as stalled on the CRM dashboard
Colour	To tell the column apart at a glance

The pipeline marked as **default** is the one the board opens with and the one preselected when you create an opportunity.

The type is what matters, and it isn't decorative. An **Open** stage keeps the opportunity in play; a **Won** or **Lost** stage closes it automatically as soon as the card lands there. You need at least one of each at the end of the process, or you'll have no way of closing anything.

The stage's probability is the one inherited by opportunities that enter it. Set it sensibly: it's half of the forecast.

Step 2 — Create the opportunity

From **CRM › Opportunities**, click **Create opportunity** — or press the `N` key. You can also create it directly in its column, using the + button in the header of each stage on the board.

Only three fields are mandatory: the deal's **name**, the **funnel** and the **stage**. Fill in the rest if you have it:

- **Customer** or **lead**. Link it to the lead while the contact isn't yet a customer, and to the customer once they are. This is what ties the whole cycle together, from acquisition to invoice.
- **Owner**, so you know who is responsible for the follow-up.
- **Value**, **currency**, **probability** and **expected close**.
- **Tags** and a free-text **description**.

A note on probability. If you leave it at 0, the opportunity inherits its stage's probability when saved. If you enter a number, yours takes precedence: Fube assumes you've assessed the case and doesn't overwrite it.

Step 3 — With product lines, the lines set the value

This is the first of the two things Fube decides for you.

On the opportunity's record there's a **products** panel where you specify what you're going to sell, with quantity and price. As soon as you add **a single line**, the **opportunity's value becomes the sum of the lines**, and it's recalculated automatically each time you add, change or remove one. When you edit the opportunity, the **Value** field is locked and underneath it tells you where it comes from: 'Calculated from the lines', with the amount. To change the value, change the lines.

The rule, in one line: **without product lines your amount applies; with lines the sum of the lines applies.** So choose one of the two approaches:

- Are you making a rough estimate because you don't know the scope yet? Leave the products empty and enter the value manually.
- Do you already know what you're selling? Add the lines: the value will be their sum.

If you later remove all the lines, the value stays at 0 and the field is yours again to enter the amount manually.

Step 4 — Move the cards around the board

CRM › Funnel is the board: one column per stage and one card per opportunity. Drag the card to another column and the opportunity changes stage. You can also change it from the record, if you'd rather not drag.

When you drop a card on a **Won** or **Lost** stage, three things happen at once:

1. The opportunity's **status** changes to won or lost.
2. The **close date** is recorded.
3. **The probability is forced to 100% or 0%** — and the weighted value changes with it.

That third point is the second thing Fube decides for you. If you had set 60% manually and you close the sale, it doesn't stay at 60%: it becomes 100%. It makes sense — a won sale is no longer a probability — but it explains why the forecast moves by itself when you close.

When you drag to a Lost column, Fube stops you and asks for the reason. You can enter it or skip it, but the box appears right there, when it's fresh in your mind. That text is what later lets you answer why you lose deals: on price, on timing, because they don't reply.

And the other way round: if you move a closed opportunity back to an **Open** stage, the **close date is cleared** and it inherits the destination stage's probability again. Reopening is a normal move, not a fix.

Step 5 — Read the forecast without fooling yourself

The **weighted value** of an opportunity is the simplest calculation in the world:

```
weighted value = value × probability ÷ 100
```

A €10,000 deal at 30% contributes €3,000. Fube works it out; you set the value and, if you want, the probability.

At the top of the board you have three figures and a breakdown:

Indicator	What it counts
Open opportunities	How many are still in play
Total value	The gross sum of the open ones: what you would bring in if you won absolutely everything
Weighted forecast	The sum of the weighted values of the open ones: what you can expect
View breakdown by stage and month	The same money split by stage and by expected close month

All three **only count open opportunities**. Anything already won or lost is left out: the forecast measures what is still in play, not what has already happened.

Watch out for the number shown under each column's name. It is the sum of the **value** of the cards in that column, unweighted. It helps you see where business is building up; don't compare it with the weighted forecast at the top, because they don't measure the same thing.

If the selected pipeline isn't the one you want, change it in the selector at the top: the three figures are recalculated for that pipeline.

Step 6 — The opportunity record, when it's time to close

Click a card or a row in the list to open its record. At the top, four indicators: **Value**, **Weighted value**, **Probability** and **Expected close**. If it is lost, the **loss reason** is highlighted. And below, two panels:

- **Products** — the deal's lines, with their total. Remember step 3: whatever they add up to is what the opportunity will be worth.
- **Notes and activity** — the thread of the negotiation. Each entry is saved with its date and author and **is not overwritten**: an objection, a price agreement, the call nobody answered. This is what lets someone else on the team pick up the deal without calling you. Mind the name: the equivalent panel on the **customer** record is titled 'Follow-up', so on the opportunity look for **Notes and activity**.

To schedule the next call or the closing meeting, don't use notes: use a **follow-up activity**, which does have a date, an owner and a reminder.

Edge cases and common mistakes

- **The board doesn't show all my opportunities.** The board displays at most **500**; if you go over that, it tells you in writing below the header. Filter by pipeline or work from the list in **CRM › Opportunities**, which does paginate.
- **'This pipeline has no stages'.** You've created the pipeline but not its stages. Go back to **CRM › Funnel › Set up pipelines** and add them, with at least one Won and one Lost.
- **It won't let me type in the Value field.** The opportunity has product lines and the value is their sum. See step 3.
- **The probability changed by itself when I moved the card.** It's inherited from the destination stage. If your estimate is different, edit it after moving the card, not before.
- **I closed a sale and the forecast went down.** That's correct: once won, it is no longer open and drops out of the forecast. Won business is measured separately, in the **CRM dashboard**.

- **An opportunity has been stuck for weeks.** The CRM dashboard flags them as stalled, but only if their stage has **Days to stall** set (step 1). The stages Fube creates by default come without them: until you set them, the reliable signal is an overdue **expected close**.

Frequently asked questions

What's the difference between a lead and an opportunity?

The lead is the **person**; the opportunity is the **sale**, with its amount. The same lead or customer can have several opportunities at once, which is why they are different things. Converting one into the other is covered in **convert a lead into a customer**.

Do I calculate the weighted value myself?

No. Fube multiplies the value by the probability. You set the value — or the product lines set it — and, if you want, you adjust the probability.

Can I have several funnels at once?

Yes. Each pipeline has its own stages and board, and the selector at the top decides which one you're looking at. The forecast figures are recalculated for the selected pipeline.

Can I recover an opportunity I marked as lost?

Yes. Move it to an Open-type stage: the close date is cleared and it counts towards the forecast again. Any reason for loss you had written is kept.

Can the customer see the opportunity notes?

No. They are internal to your team, like the rest of the CRM.

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